Quality Assurance Module

Application User Guide

August 2009

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About this Guide

This document is intended for the typical user of the PSI:Capture Quality Assurance Module. Typical tasks for such persons include reviewing scanned documents for data accuracy and image quality. These document types should be configured by an administrator prior to the start of the capture process. Refer to the Administrative Guide as necessary for information relating to configuration of document types.

About PSIGEN Software, Inc.

PSIGEN Software is a fast growing, privately held, provider of document capture and retrieval software solutions. Our product lines address production capture, distributed capture, web based retrieval, including the Microsoft SharePoint platform. Our largest customers include scanning service providers, business process outsourcers, and the corporate services divisions of Fortune 500 corporations. We have significant customer concentration in financial services, healthcare, and manufacturing. Our channel partners include document imaging value added resellers, major brand MFP dealers, Microsoft solution providers, and document management software vendors.

Table of Contents

Quality Assurance Overview Page 5

Select Batch Page 6

User Interface Overview Pages 7 - 8

Frame/Pane Docking & Pinning Pages 8 - 10

Toolbars Pages 11 - 13

- Quality Assurance Toolbar Pages 11 - 12
- Viewing Toolbar Pages 12 - 13

Navigator Pane Pages 14 - 16

Batch Viewer Pane (Tree View) Page 17

- Batch Viewing Toolbar Page 18
- Editing Toolbars Pages 19 - 20
- Flags Pages 21 - 24
- Go Page 25
- Recycle Bin Pages 25
- Crop Page Pages 25 - 27
- Page Information Pages 28 - 30

Batch Viewer Pane (Data View) Pages 31

Image Viewer Pane Pages 32 - 33

Menu Bar Page 34

- File Pages 34 - 62
  - Image Processing Options Pages 50 - 62
- View Pages 63 - 66
- Security Pages 67 - 69
- Window Pages 70 - 72

Help Pages 73 - 75

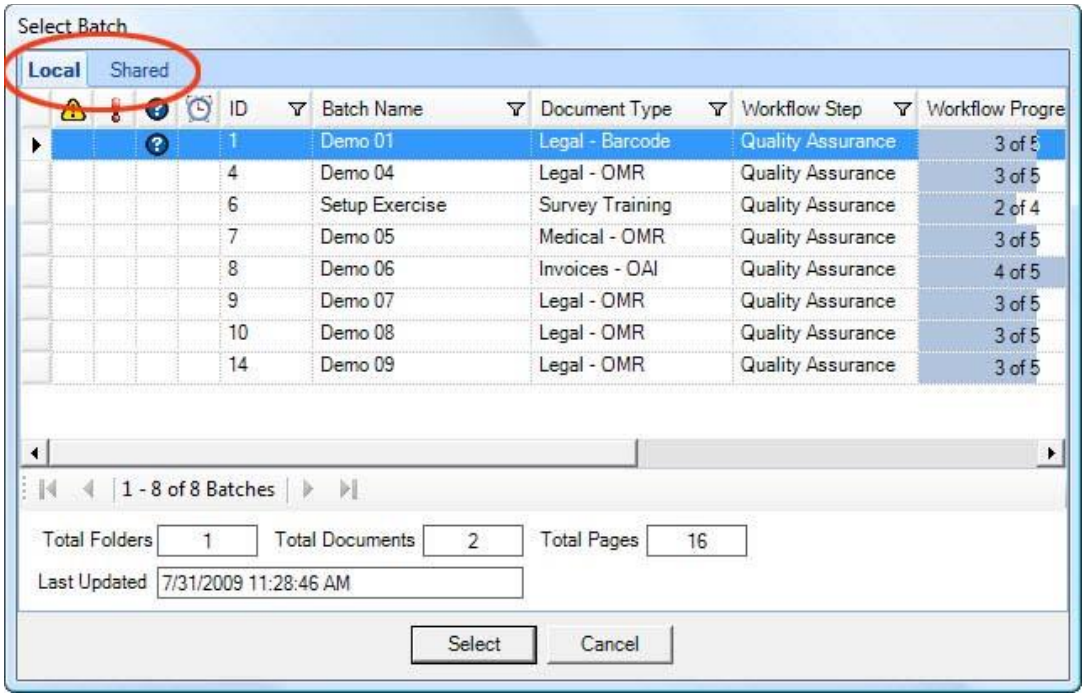
Appendix A Pages 76 - 77

Quality Assurance Module Overview

The purpose of the Quality Assurance (QA) module is to verify that the images are legible, contain no unwanted images and are separated correctly. The QA module enables the user to replace pages that were inadequately scanned or to insert one or more pages that were found to be missing. The QA user has the ability to view each image individually, to view all pages of a document via thumbnails, or open multiple document views simultaneously. A flagging system enables multiple operators and supervisors to manage the process of identifying items to review, reject or delete. The QA module can also be used to verify that two independent documents were not split or combined in error, permitting the user to split/combine documents as necessary to achieve batch integrity. Additionally, the user may “drag and drop” pages, documents or folders to insure that the images are in the preferred order.

Select Batch

To begin the quality assurance process, click on the Quality Assurance icon in the Navigator Pane. The "Select Batch" window will open.


Select Batch
Local
Shared
ID
Batch Name
Document Type
Workflow Step
Workflow Progre
1 Demo 01 Legal - Barcode Quality Assurance 3 of 5
4 Demo 04 Legal - OMR Quality Assurance 3 of 5
6 Setup Exercise Survey Training Quality Assurance 2 of 4
7 Demo 05 Medical - OMR Quality Assurance 3 of 5
8 Demo 06 Invoices - OAI Quality Assurance 4 of 5
9 Demo 07 Legal - OMR Quality Assurance 3 of 5
10 Demo 08 Legal - OMR Quality Assurance 3 of 5
14 Demo 09 Legal - OMR Quality Assurance 3 of 5
1 - 8 of 8 Batches
Total Folders 1
Total Documents 2
Total Pages 16
Last Updated 7/31/2009 11:28:46 AM
Select
Cancel

The user can select a batch to perform QA on by making a selection from the list and then hitting "Select". All batches currently in the QA workflow step are displayed here.

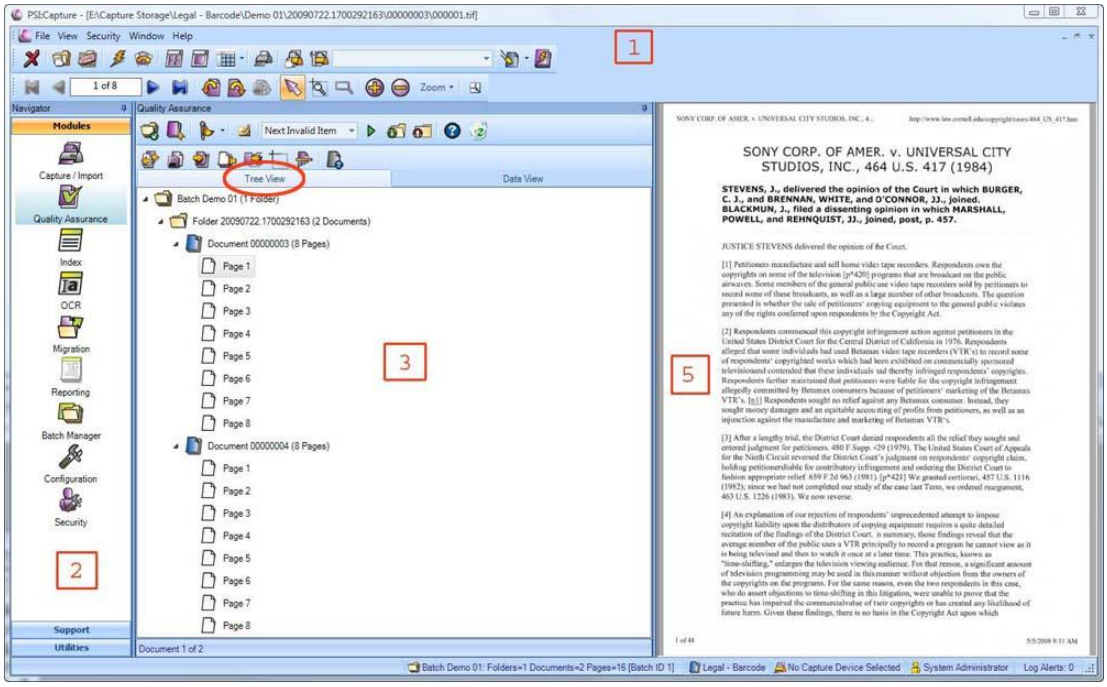
Local/Shared Tabs

A document type set as a Local will show its batches on the Local tab if it was created on that computer. A document type set as part of a multi station deployment would typically be configured as Shared, and therefore its batches would be found on the Shared tab. See “Document Type Configuration (Step 1 of 9)” in the Administrative Guide for further detail.

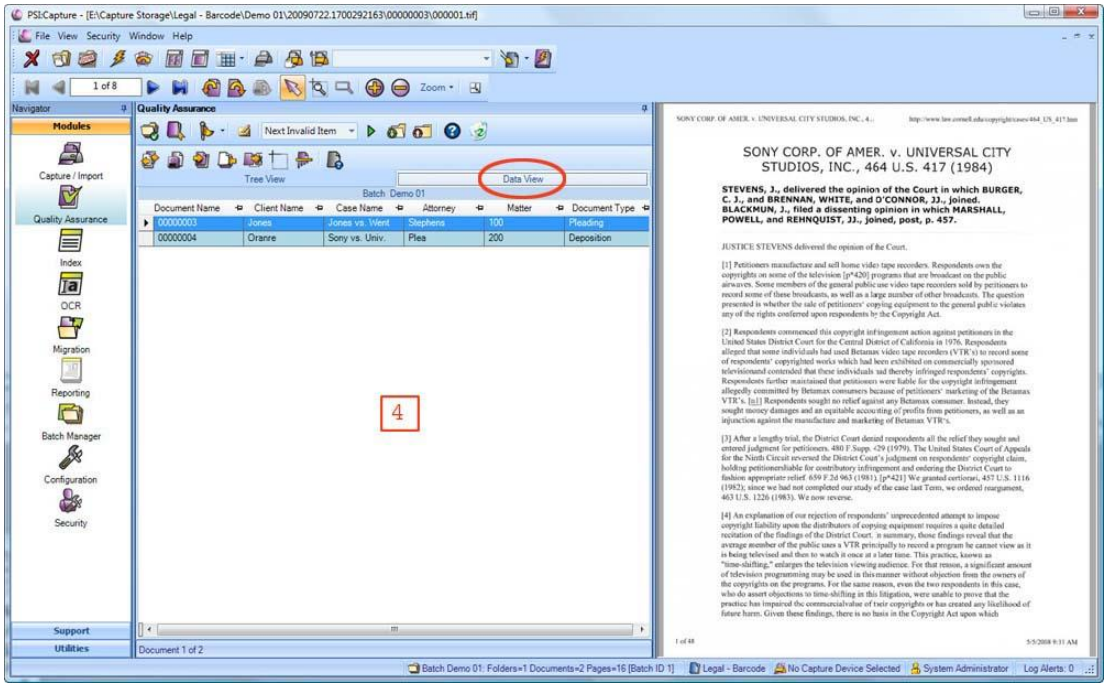
User Interface Overview

The PSI:Capture interface is divided into different functional areas as seen in the layout below. These panes of the user interface will be referenced throughout this manual.

Tree View



Data View

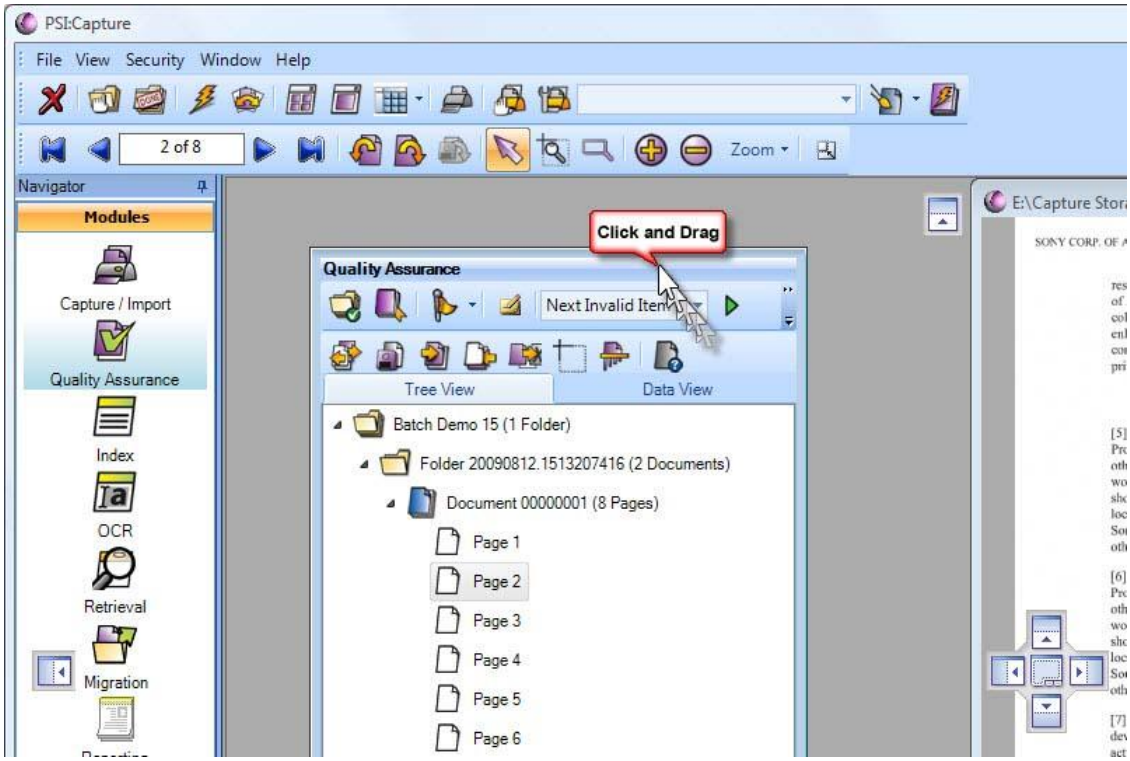


1. Toolbar Banner
2. Navigator Pane
3. Batch Viewer Pane
4. Data View Pane
5. Image Viewer Pane

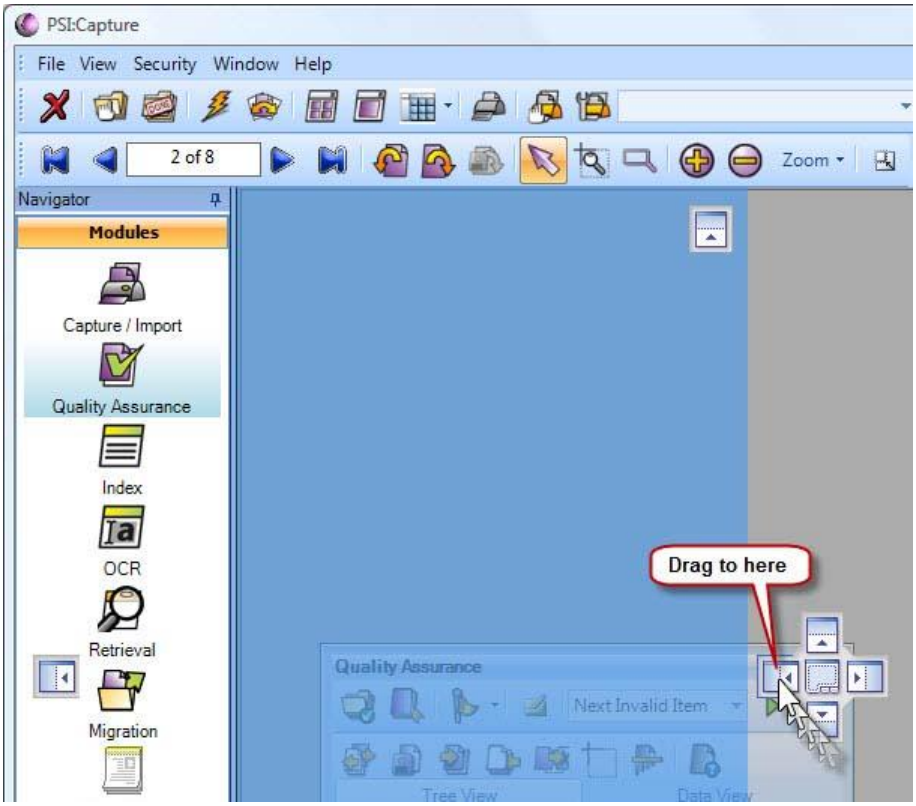
Frame/Pane Docking & Pinning

Docking

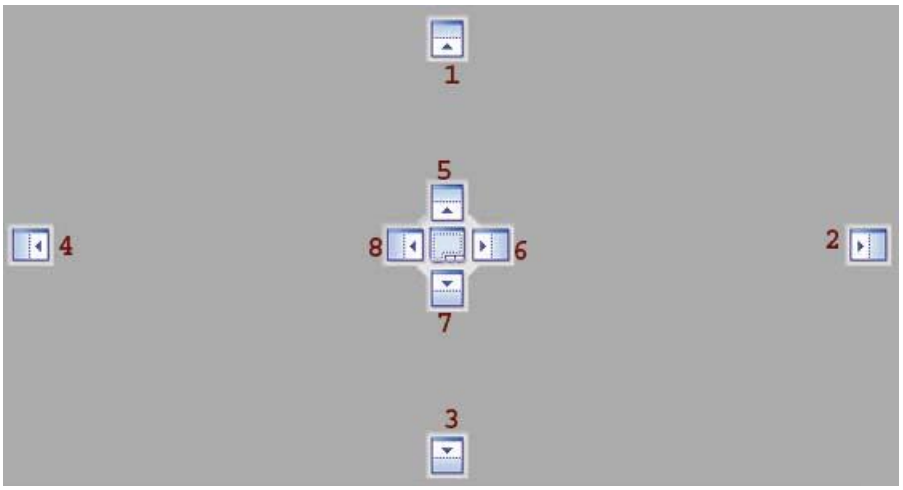
The Navigator and Batch Viewer Panes can be docked to the workspace (default) or made into a standalone window, which can be resized and moved about independent of the PSI:Capture workspace. To undock the pane, click the title bar and drag.



To re-dock a pane, click the title bar and drag to one of the arrows. The blue shaded area indicates where the pane will be docked.



The different arrows allow the user to dock the pane to a different location of the work area.



1. Dock the pane to the top of the work area, below the toolbar
2. Dock the pane to the extreme right of the work area
3. Dock the pane to the extreme bottom of the work area
4. Dock the pane to the extreme left of the work area
5. Dock the pane below another pane already docked to the top
6. Dock the pane next to another pane already docked to the right

7. Dock the pane above another pane already docked to the bottom
8. Dock the pane next to another pane already docked to the left

When dragged to this icon, any pane becomes a standalone window.

Pinning

The docked panes can either be pinned to the workspace (default) or set to auto hide into the left margin. To enable or disable auto hide, click on the thumbtack icon in the upper right corner of the pane.

Toolbars

Quality Assurance Toolbar

Close Module – closes the current module.

Select Batch – Opens the Batch Manager list for selection of existing batches for processing.

Close Batch – brings up the "Close Batch" dialog box.

Auto View – automatically advances through each page for viewing at a user defined time interval. See "File – Quality Assurance Settings" for more information.

Auto Orient Pages – attempts to automatically orients all pages in the current Batch.

Toggle Index Data Editing – enables and disables the editing of index data in Data View. **NOTE:** "Allow Index Data to be edited" must be enabled in Quality Assurance Settings.

Run Lookups – used in data view to perform data lookup on index fields.

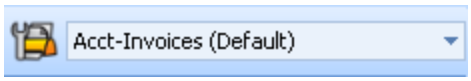
Toggle Thumbnail Viewer – toggles the Thumbnail Viewer on/off. The Thumbnail Viewer displays the pages of the current document as thumbnails in the Image Viewer Pane. The user can choose from 4 different thumbnail sizes.

Open New Viewer – opens a new viewer in the Image Viewer Pane.

Data View Records Display – allows user to choose which type of records to show in data view (Folder/Document hierarchical view, Folder Records only or Document Records only).

Print – prints the current page.

Select Capture Device – allows the selection of the device used to capture images.

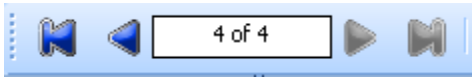


Configure Device Profiles – allows for the creation of device profiles for capture device settings. For scanners, driver settings can be configured and named for quick recall during capture operations. For the Import Device, folder paths can be specified for quick access to image directories.

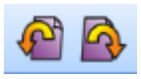
Image Processing – allows image processing to be run on pages in the current Batch.

QA Auto Processing – allows various QA auto processing commands to be configured and run on the current Batch.

Viewing Toolbar



Page Navigator – allows User to navigate between pages in the current document.

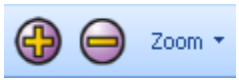
 **Rotate Left/Right**– provides the ability to rotate the document. Rotating will only affect the way the images are displayed in the Viewer. To save the Rotation to the actual image file, you must click the Save Rotation button.

Save Rotation – save the current rotated page.

Pointer – allows selection of a page or item.

Selection Zoom – click and drag with your left mouse button in the Image Viewer Pane to zoom in on a selected area of a page. Double clicking will bring the image back to Fit Page zoom level.

Magnifier – when selected, a left click will magnify the area on the document.

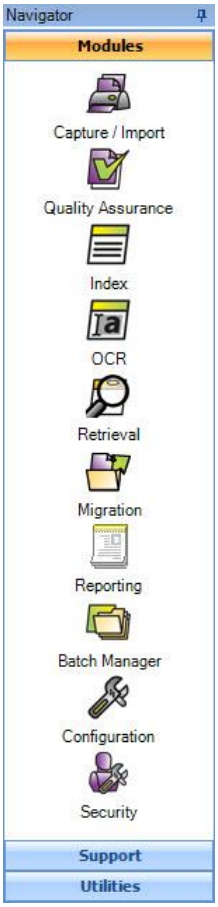


Zoom Controls – provides zoom in and zoom out capability, as well as a drop down with predefined zoom levels.

Toggle Standalone Viewer – allows the image viewing pane to be detached. This can be useful in a multi-monitor/large display setup.

Navigation Pane

Navigation Pane can either be pinned to the desktop (default) or set to auto hide.



Modules Tab

Capture / Import – Opens the Capture/Import module

Quality Assurance – Opens the Quality Assurance module

Index – Opens the Index module

OCR – Opens the OCR module

Retrieval - Opens the Retrieval module.

Migration – Opens the Migration module

Reporting – Opens the Reporting module

Batch Manager – Opens the Batch Manager module

Configuration – Opens the Configuration module

Security – Opens the Security module

Support Tab

Contains links to support website, support email, and view logs.

Support Web Site

Opens the default web browser to www.psigen.com/support

Email Support

Opens the default mail service for user to compose an email to support@psigen.com.

View Logs

Displays a list of PSI:Capture error and processing logs.

Utilities Tab

Contains Barcode Generator and Network Manager utilities.

Barcode Generator

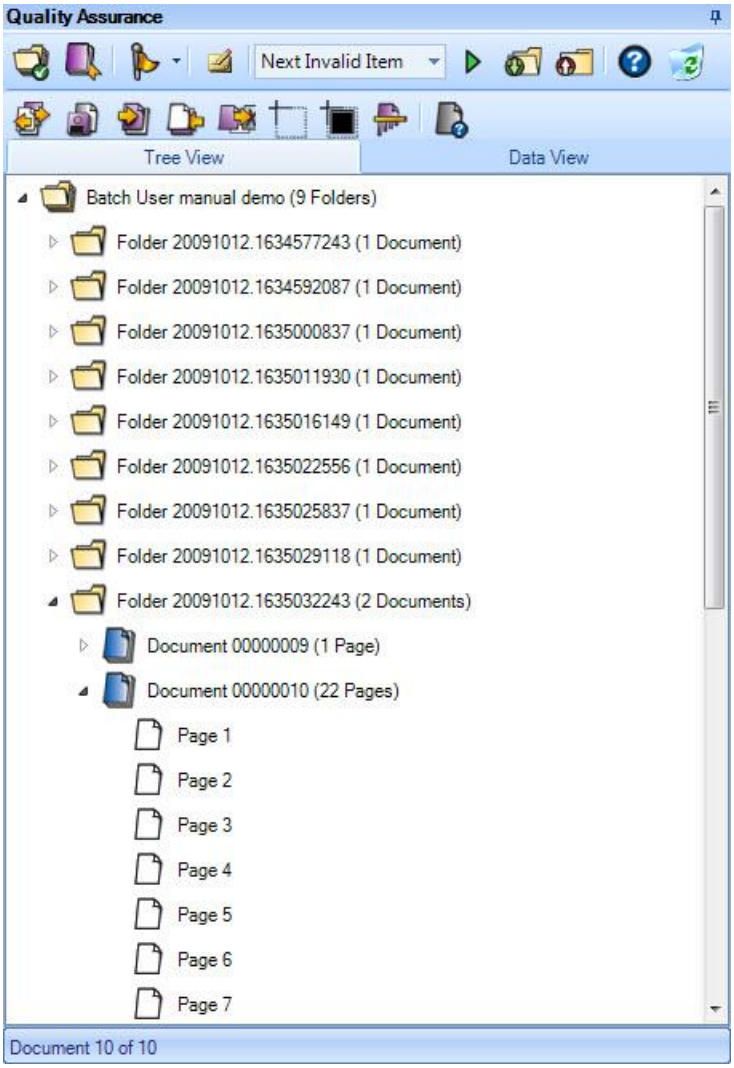
Opens up a utility for users to create/save/print custom separator/indexing barcode sheets.

Network Manager

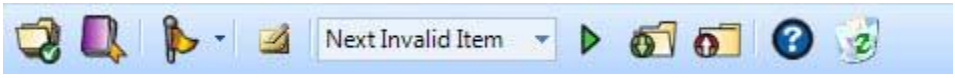
Allows user to manage the port and IP settings for PSIGEN Platform Services and License Server.

Batch Viewer Pane (Tree View)

Displays in tree structure the contents of the current batch in Quality Assurance, as well as a collection of various toolbars.



Batch Viewing Toolbar

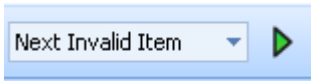


Validate Batch – checks if batch has met validation critera dictated in document type configuration and displays the Validation Results dialog.

Toggle Bookmark – Allows you set a Bookmark on the selected item. Only one Bookmark can exist in a Batch at one time. Setting a Bookmark is useful if you need to know where you left off in a Batch if you need to suspend the Batch and come back to it later.

Flags – Folders, Documents and Pages can be tagged with flags via the drop down menu. Options include: set review, reject, delete, or process flags, clear one or all flags, file size auto flagging, image level auto flagging, delete items flagged for deletion, reject items flagged for rejection, split documents at pages flagged for processing.

Notes – allows User to attach Note(s) to any Batch, Folder, Document or Page.



Go – Skips to the next item in the tree that matches the selected criteria when you press the Go button.

Expand All Batch Tree Nodes – opens all folders and documents within the batch.

Collapse All Batch Tree Nodes - collapses all folders and documents within the batch.

Hot Keys Help – lists keyboard shortcuts for commonly used toolbar commands. See Appendex A for for complete list.

Recycle Bin – opens a window to view previously deleted items.

Editing Toolbars

Batch Editing Toolbar

Reject Batch – rejects batch and sends it to an earlier workflow step.

Folder Editing Toolbar

Combine with Previous Folder – Combines the current Folder with the Folder that comes before it. This function will append all of the Documents in the selected Folder to the previous Folder.

Rename Folder – Allows the currently selected Folder to be renamed.

Delete Folder – Deletes the selected Folder and all its contents from the Batch.

Reject Folder – Rejects the Folder and sends it to the Exceptions Batch linked to the current Batch. If the current Batch does not have an associated Exceptions Batch yet, it will be created.

Document Editing Toolbar

Create New Folder – Creates a New Folder containing this Document and all the Documents that follow it in its original Folder.

Combine with Previous Document – Combines the current Document with the Document that comes before it. This function will append all of the pages in the selected Document to the previous Document.

Delete Document – Deletes the selected Document and all its contents from the Batch.

Reject Document – Rejects the current Document and sends it to the Exceptions Batch linked to the current Batch. If the current Batch does not have an associated Exceptions Batch yet, it will be created.

Page Editing Toolbar

Split Document – Splits one Document into two Documents with the selected Page being the first Page in the new Document. The selected Page and all the Pages that follow it in its original Document will be added to a new Document that will be created immediately after the original Document.

Save Page – Allows you to save a Page from the Batch to disk.

Insert Page Before – inserts a new Page into a Document before the currently selected Page.

Insert Page After – inserts a new Page into a Document after the currently selected Page.

Replace Page – replaces the selected page with a new page

Crop Page – allows an area of the current page to be cropped out. The cropped portion can replace the current page's image, be inserted as a new page in the current Document or inserted as a new Document.

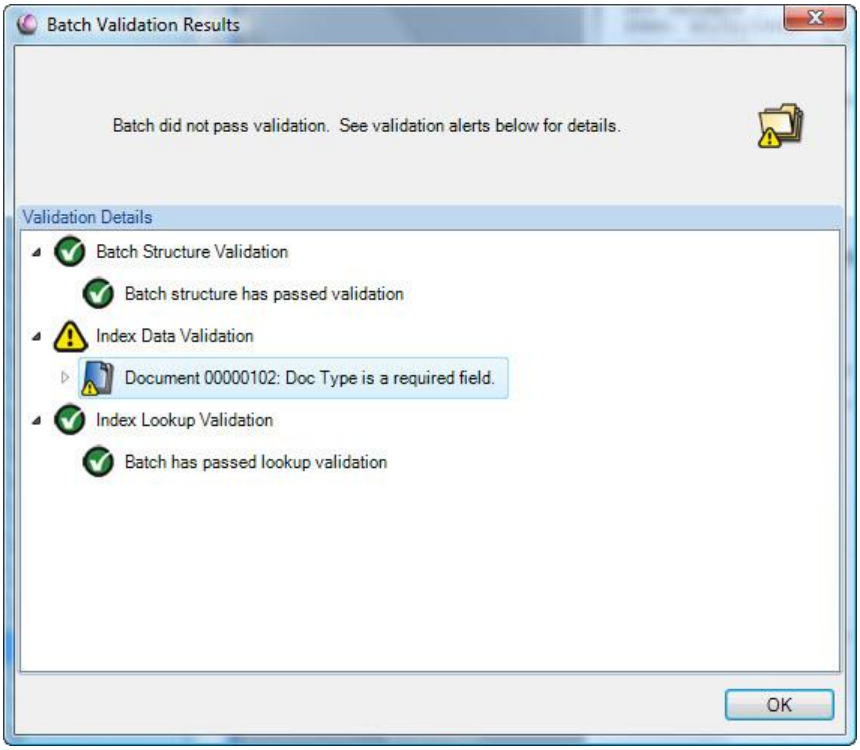
Redaction – allows a selected area of the current page to be blacked out.

Delete Page – deletes the currently selected Page from the Batch.

Page Information – provides information on the current page including general page properties, recognition results, OMR results, and OCR indexing results.

Validate Batch

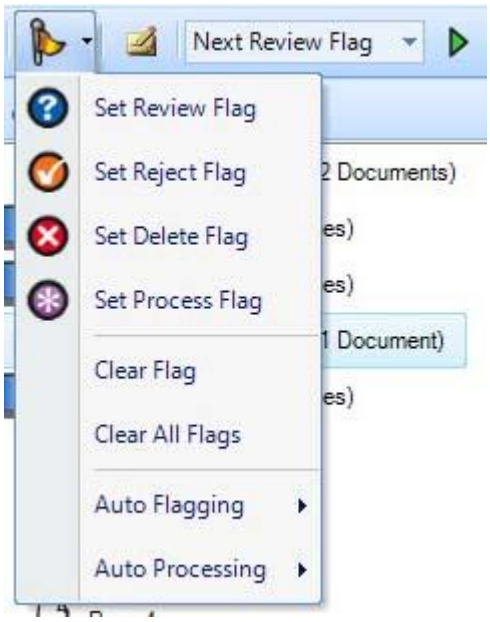
Checks if batch has met validation critera dictated in document type configuration. Any items that do not pass will be displayed here. The batch will not be allowed to leave this workflow step until the issue is corrected. See “Document Type Validation” in the Administrative Guide for more details.


Batch Validation Results
Batch did not pass validation. See validation alerts below for details.
Validation Details
Batch Structure Validation
Batch structure has passed validation
Index Data Validation
Document 00000102: Doc Type is a required field.
Index Lookup Validation
Batch has passed lookup validation
OK

Flags

There are four types of flags that can be tagged to a Batch, Folder, Document, or Page.

NOTE: A rejection flag can only be assigned to a Batch, Folder, or Document.



Set Review Flag – places a review flag on current Batch, Folder, Document, or Page.

Set Reject Flag – places a reject flag on current Batch, Folder, or Document (cannot be place on a Page).

Set Delete Flag – places a delete flag on current Batch, Folder, Document, or Page.

Set Process Flag – places a process flag on current Batch, Folder, Document, or Page.

Clear Flag – removes flag on selected item.

Clear All Flags – removes all flags in the current Batch.

Auto Flagging – allows flags to be set automatically based on certain criteria.

File Size Auto Flagging – Automatically tags one of the four flags to a page based on size of the image file. A separate threshold can be set for the front and the back of a page. **NOTE:** The back threshold only applies to batches scanned in duplex with pages marked as back pages.

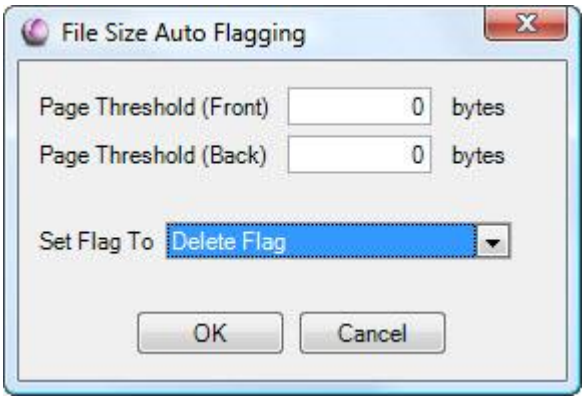
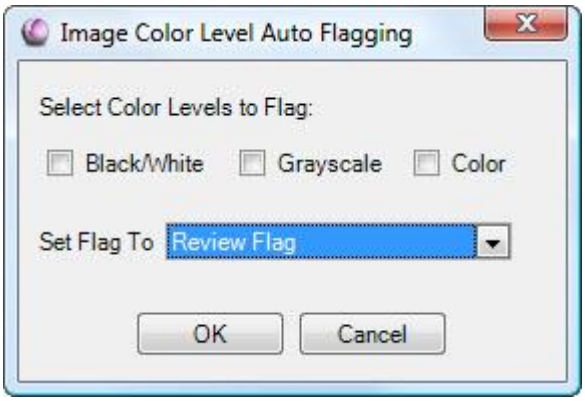
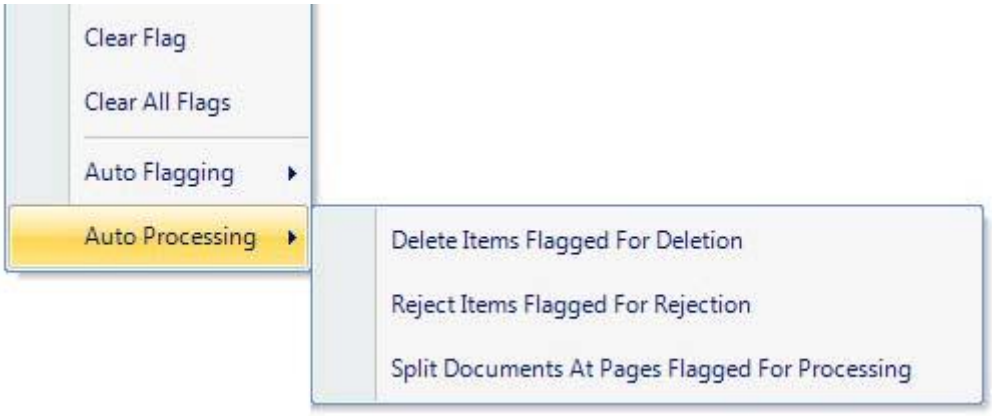


Image Color Level Auto Flagging – Automatically tags one of the four flags to a page based on image color level (black/white, grayscale, or color).



Auto Processing – Items that are tagged by a flag can be handled in one of three ways.



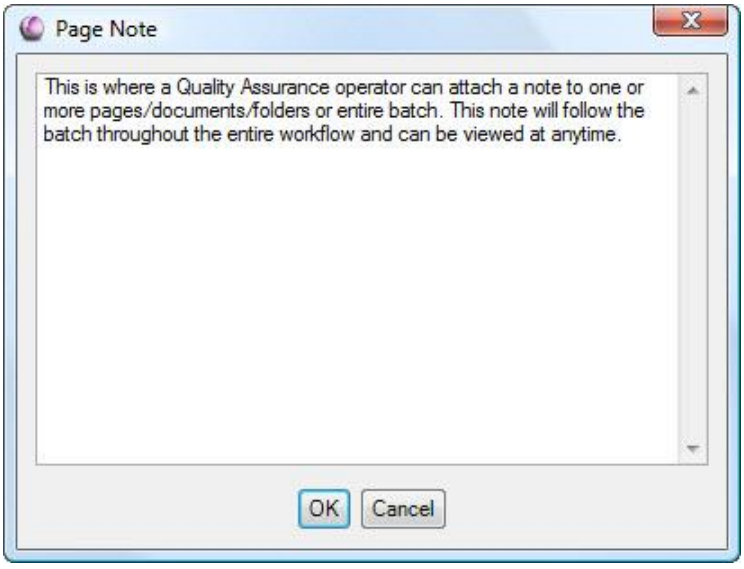
Delete Items Flagged For Deletion – will delete all items tagged with a delete flag.

Reject Items Flagged For Rejection – will reject all items tagged with a reject flag, and create an exceptions batch with the same name as the current batch, containing the rejected item(s).

Split Documents At Pages Flagged For Processing – Creates a new document at the page(s) tagged with the process flag.

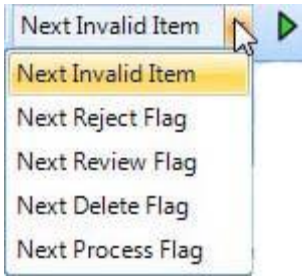
Notes

Allows the user to attach a note to the batch, folder, document, or page. The note will follow the batch throughout the entire workflow and can be viewed at anytime.


Page Note
This is where a Quality Assurance operator can attach a note to one or more pages/documents/folders or entire batch. This note will follow the batch throughout the entire workflow and can be viewed at anytime.
OK
Cancel

Go

Skips to the next item in the tree that matches the selected criteria when you press the Go button.

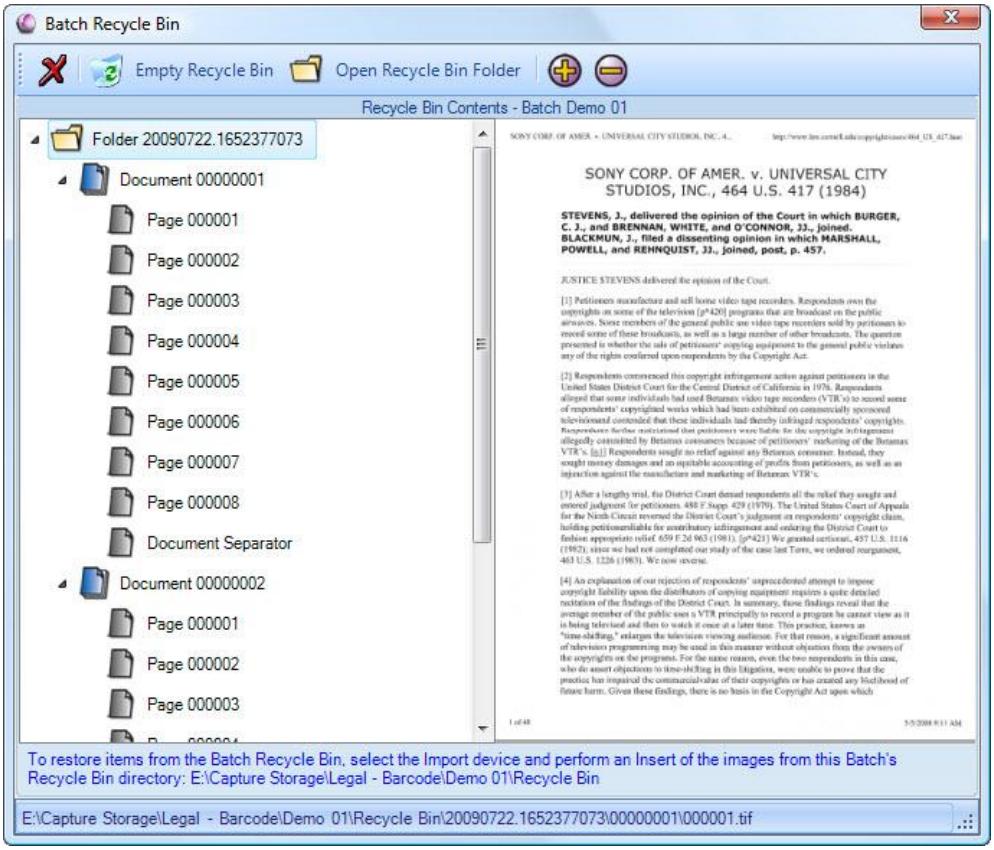


Recycle Bin

Opens a window to view previously deleted items in PSI:Capture.

Batch Recycle Bin

Manually deleted pages can be found here, arranged in a tree structure according to their original position.


Batch Recycle Bin
Empty Recycle Bin
Open Recycle Bin Folder
Recycle Bin Contents - Batch Demo 01
Folder 20090722.1652377073
Document 00000001
Page 000001
Page 000002
Page 000003
Page 000004
Page 000005
Page 000006
Page 000007
Page 000008
Document Separator
Document 00000002
Page 000001
Page 000002
Page 000003
SONY CORP. OF AMER. v. UNIVERSAL CITY STUDIOS, INC., 464 U.S. 417 (1984)
To restore items from the Batch Recycle Bin, select the Import device and perform an Insert of the images from this Batch's Recycle Bin directory: E:\Capture Storage\Legal - Barcode\Demo 01\Recycle Bin
E:\Capture Storage\Legal - Barcode\Demo 01\Recycle Bin\20090722.1652377073\00000001\000001.tif

Close

Exits from the Batch Recycle Bin.

Empty Recycle Bin

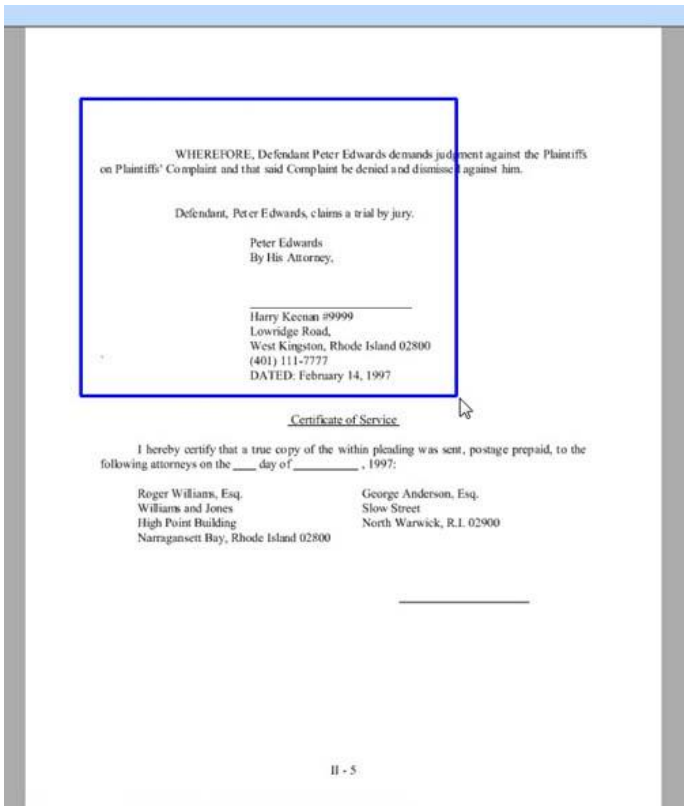
Permanently deletes all image files currently in the Batch Recycle Bin.

Open Recycle Bin Folder

Opens the folder where the contents of the Batch Recycle Bin are stored. User can retrieve these files from here if needed.

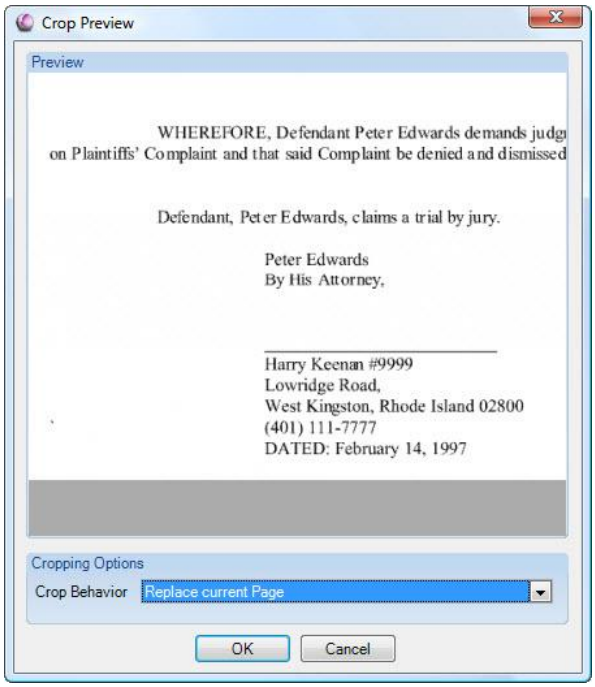
Crop Page

Changes the pointer to a crop cursor, allowing the user to drag and select (click left mouse button on the image, while holding the mouse button drag to the opposite corner and let go) to capture a portion of the current page.


WHEREFORE, Defendant Peter Edwards demands judgment against the Plaintiffs on Plaintiffs' Complaint and that said Complaint be denied and dismissed against him.
Defendant, Peter Edwards, claims a trial by jury.
Peter Edwards
By His Attorney,
Harry Keenan #9999
Lowridge Road,
West Kingston, Rhode Island 02800
(401) 111-7777
DATED: February 14, 1997
Certificate of Service
I hereby certify that a true copy of the within pleading was sent, postage prepaid, to the following attorneys on the ___ day of _____, 1997:
Roger Williams, Esq.
Williams and Jones
High Point Building
Narragansett Bay, Rhode Island 02800
George Anderson, Esq.
Slow Street
North Warwick, R.I. 02900
II - 5

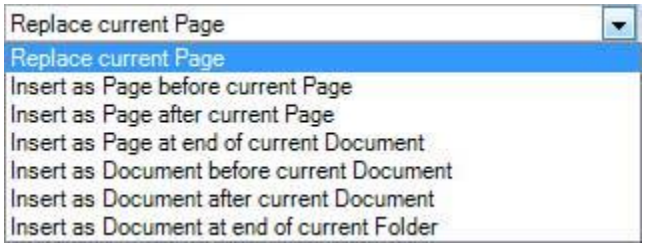
Crop Preview

As soon as the user lets go of the left mouse button, a Crop Preview window shows the results and provides options for the location of the new page.



Cropping Options (Crop Behavior)

User can select from the following options: replace current page (default), insert as page before current page, insert as page after current page, insert as page at end of current document, insert as document before current document, insert as document after current document, or insert as document at end of current folder. Press OK to save the cropped image.


Replace current Page
Replace current Page
Insert as Page before current Page
Insert as Page after current Page
Insert as Page at end of current Document
Insert as Document before current Document
Insert as Document after current Document
Insert as Document at end of current Folder

Redaction

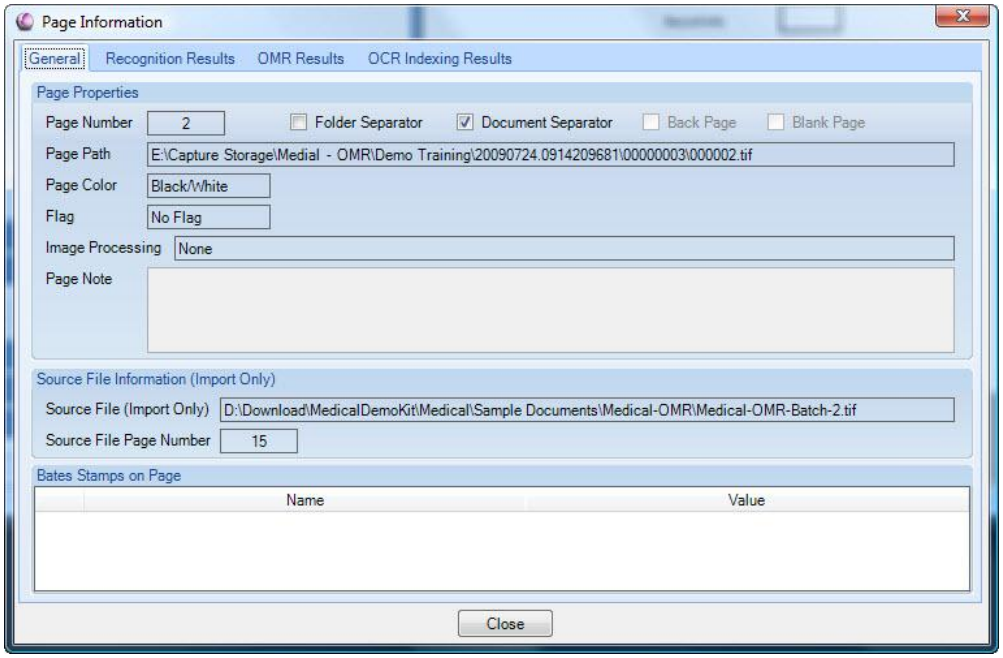
Redaction allows the user to drag and select an area by drawing a box. Once a box is drawn, a dialog will pop up displaying the contents. Hit “OK” and the contents inside the box will be blacked out.

Page Information

Brings up the Page Information dialog box containing details specific to the current page.

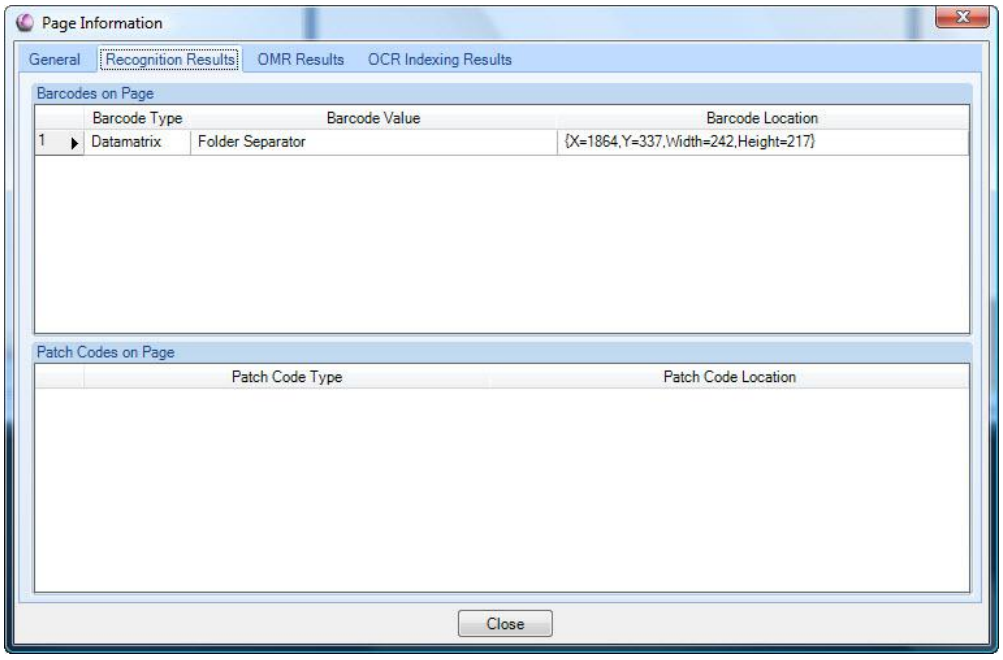
General

Shows page number, storage location, source file, bate stamp values, as well as any notes attached to the page.



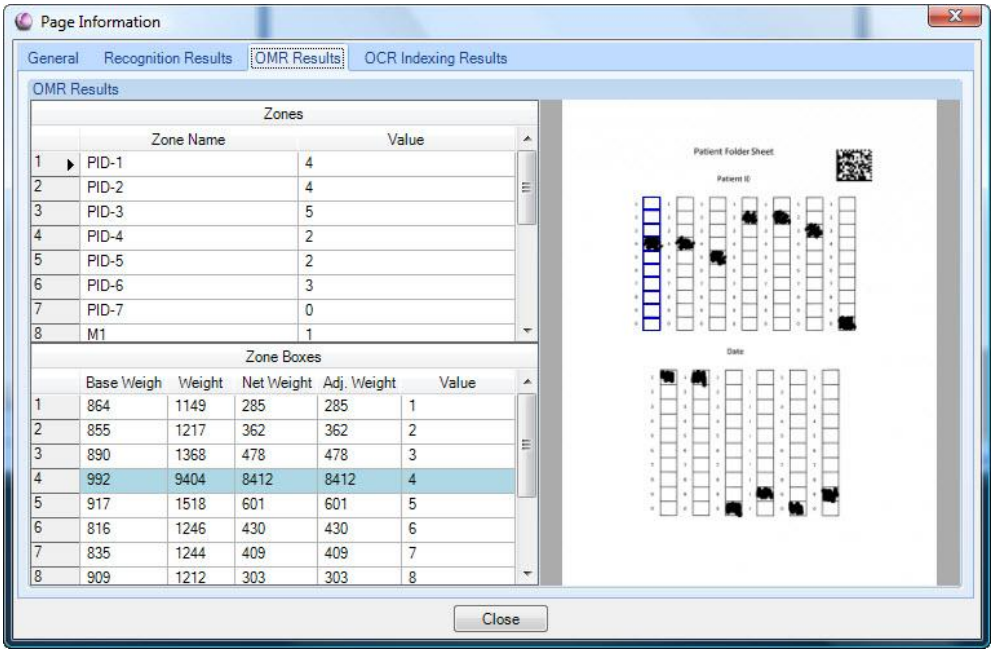
Recognition Results

Displays recognition results for barcodes and patch codes. Details include type, value, and location.



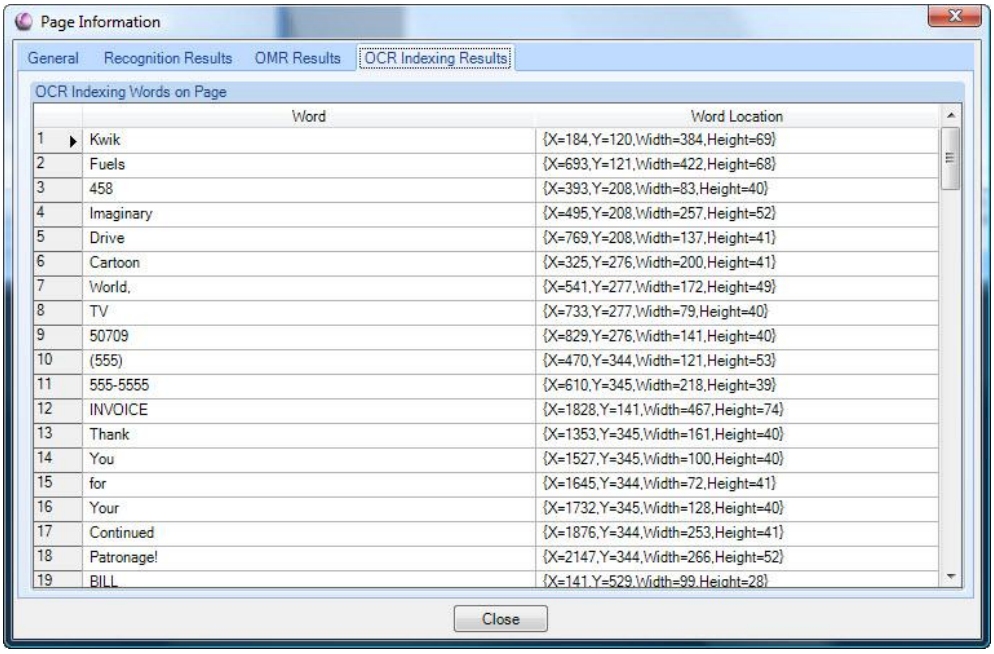
OMR (Optical Mark Recognition) Results

Displays OMR results for marks found on page. Details include, zone, value, and weight.



OCR (Optical Character Recognition) Indexing Results

Displays OCR Assisted Indexing results for words found on page. Details include word and location.



Batch Viewer Pane (Data View)

Displays in grid format the index fields and data of the current batch in Quality Assurance as well as a collection of various toolbars. Each index column as well as the Document Name can by sorted and filtered similar to the Batch Manger. Modifications of the field content can be performed at this stage (permitting “Allow Index Data to be Edited” and “Toggle Index Data Editing” are both enabled).

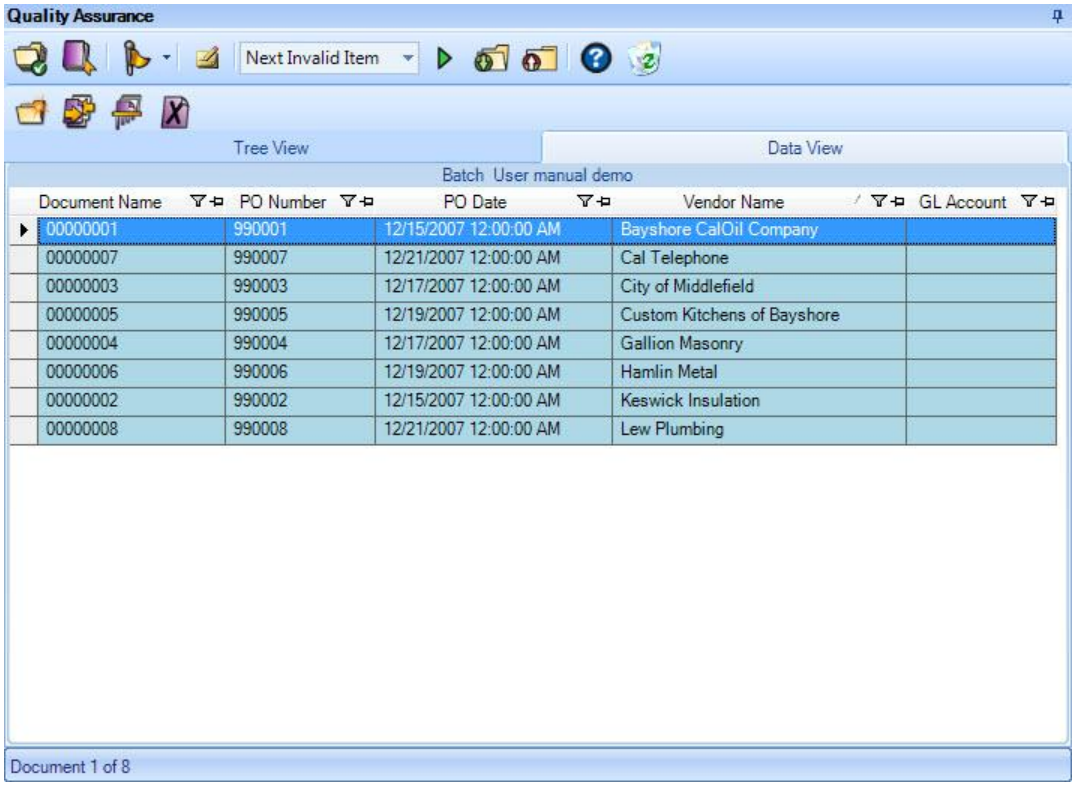
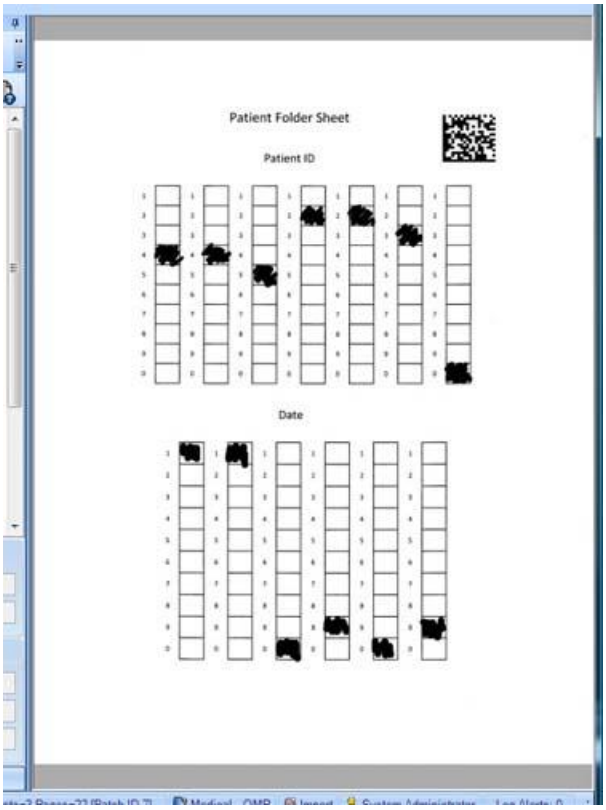

Quality Assurance
Next Invalid Item
Tree View
Data View
Batch User manual demo
Document Name
PO Number
PO Date
Vendor Name
GL Account
00000001 990001 12/15/2007 12:00:00 AM Bayshore CalOil Company
00000007 990007 12/21/2007 12:00:00 AM Cal Telephone
00000003 990003 12/17/2007 12:00:00 AM City of Middlefield
00000005 990005 12/19/2007 12:00:00 AM Custom Kitchens of Bayshore
00000004 990004 12/17/2007 12:00:00 AM Gallion Masonry
00000006 990006 12/19/2007 12:00:00 AM Hamlin Metal
00000002 990002 12/15/2007 12:00:00 AM Keswick Insulation
00000008 990008 12/21/2007 12:00:00 AM Lew Plumbing
Document 1 of 8

Image Viewer Pane

The Image Viewers consist of two parts, the “Page Viewer” and “Thumbnail Viewer”. Either one or both can be enabled for use.

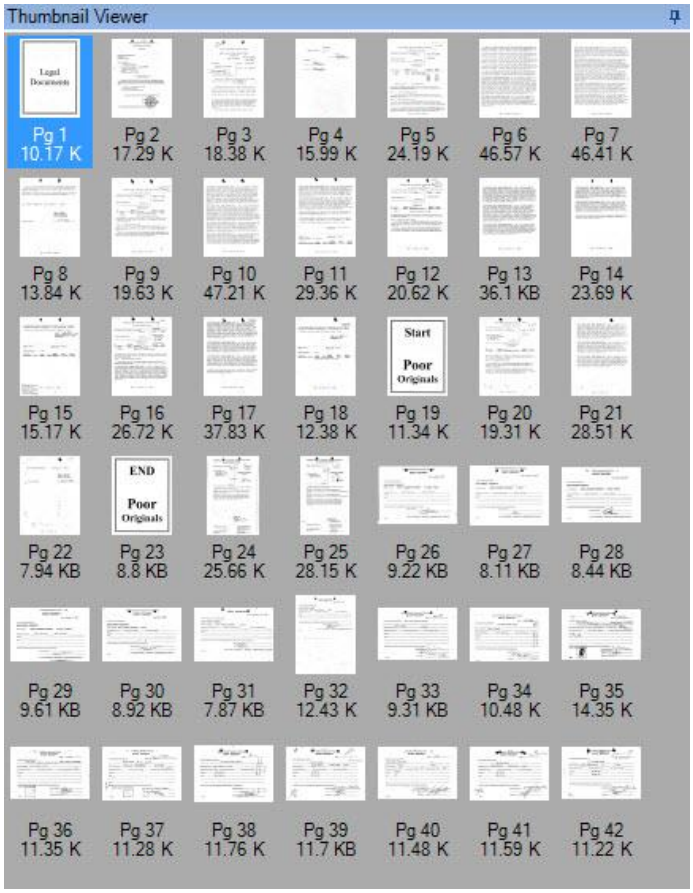
Page Viewer

Displays the image for the currently selected page.



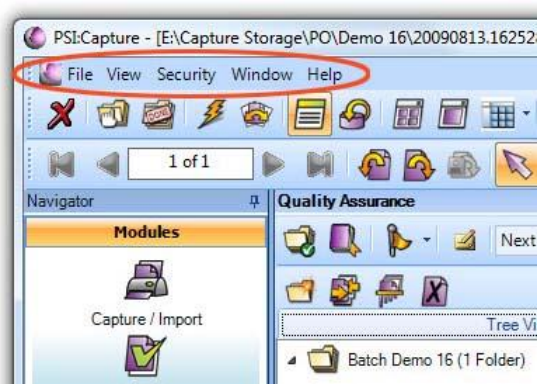
Thumbnail Viewer

Displays all pages contained within the document with the page number and image file size (optional). Once the thumbnail viewer is open, the user has the ability jump to any page in the document by selecting it. The page selected will be displayed in the Page Viewer.



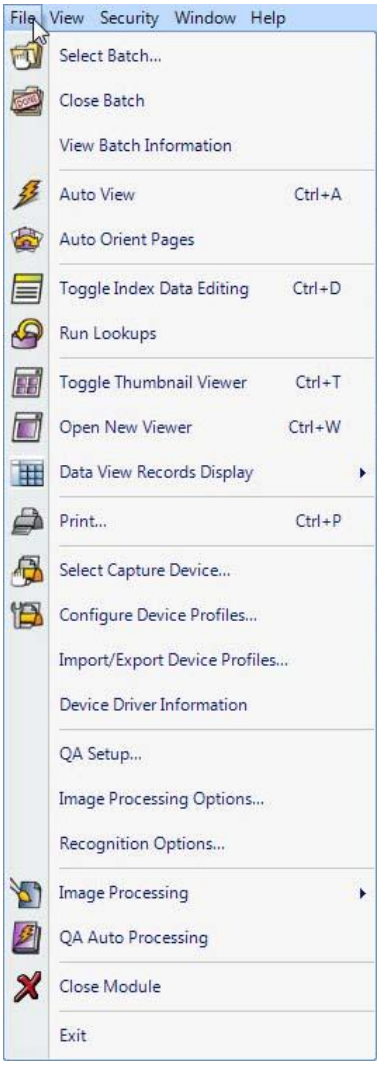
Menu Bar

Contains drop down menus: File, View, Security, Window, and Help.



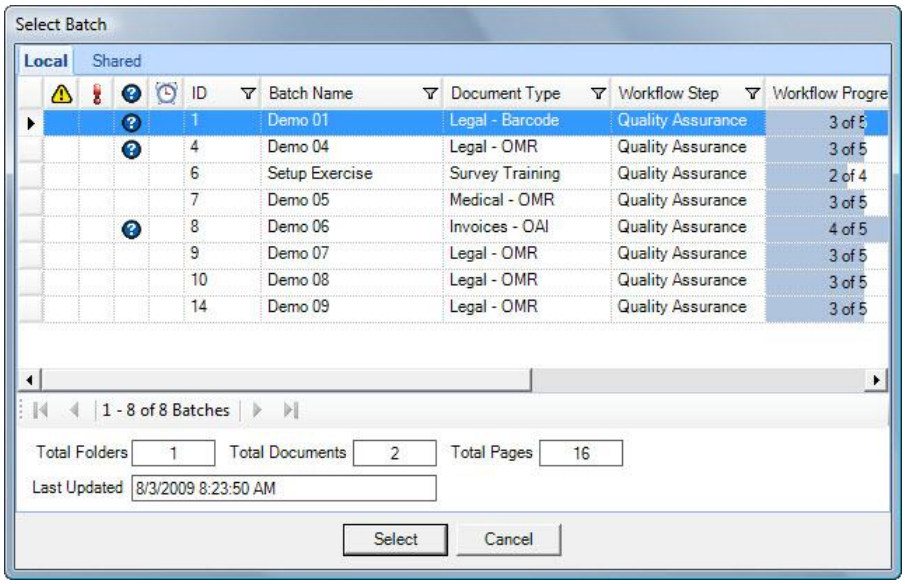
File

Contains numerous commands specific to the Quality Assurance module and the current batch.



Select Batch...

Opens the Select Batch dialog box which will list only those batches that are in the QA workflow step. By highlighting a batch and clicking “Select” the selected batch will open.

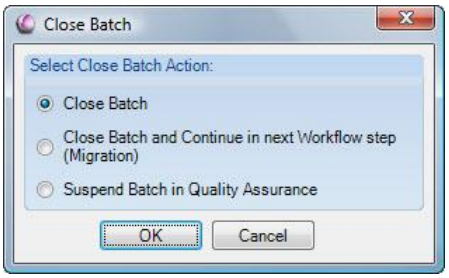

Select Batch
Local
Shared
ID
Batch Name
Document Type
Workflow Step
Workflow Progre
1 Demo 01 Legal - Barcode Quality Assurance 3 of 5
4 Demo 04 Legal - OMR Quality Assurance 3 of 5
6 Setup Exercise Survey Training Quality Assurance 2 of 4
7 Demo 05 Medical - OMR Quality Assurance 3 of 5
8 Demo 06 Invoices - OAI Quality Assurance 4 of 5
9 Demo 07 Legal - OMR Quality Assurance 3 of 5
10 Demo 08 Legal - OMR Quality Assurance 3 of 5
14 Demo 09 Legal - OMR Quality Assurance 3 of 5
1 - 8 of 8 Batches
Total Folders 1
Total Documents 2
Total Pages 16
Last Updated 8/3/2009 8:23:50 AM
Select
Cancel

Local/Shared Tabs

A document type set as a Local will show its batches on the Local tab if it was created on that computer. A document type set as part of a multi station deployment would typically be configured as Shared, and therefore its batches would be found on the Shared tab. See “Document Type Configuration (Step 1 of 9)” in the Administrative Guide for further detail.

Close Batch

Brings up the “Close Batch” dialog box. Prompts user to select one of three options.



Close Batch

Closes the current batch and sends the batch to the next workflow step. The user stays in the Quality Assurance module, and the “Select Batch” dialog box comes up.

Close Batch and Continue in next Workflow step

Closes the current batch and the Quality Assurance module. The batch is immediately reopened in the next module. Example above shows “Migration” as the next workflow step.

Suspend Batch in Quality Assurance

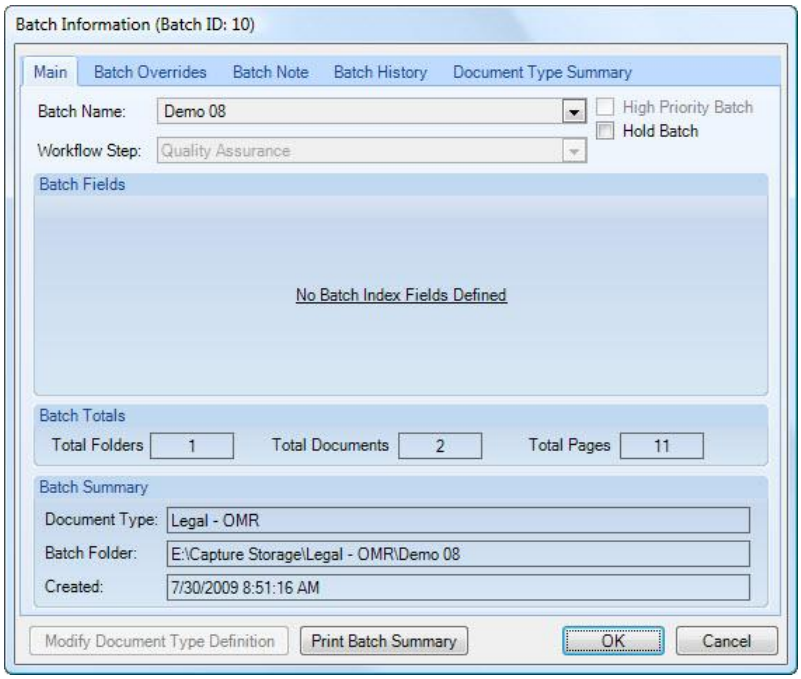
Suspends the batch in the Quality Assurance workflow step for processing at a later time. The Quality Assurance Module remains open and the “Select Batch” dialog box comes up.

View Batch Information

Opens the “Batch Information” dialog box. The button for “Modify Document Type Definition” as well as the “Batch Overrides” tab will not be available.

Main

Information on Batch Name, Batch Fields, Batch Totals, and Batch Summary are displayed. The user cannot change the batch to “High Priority” at this point, but a batch can be held by checking the “Hold Batch” box. A batch on hold will no longer be listed in the Select Batch dialog box.

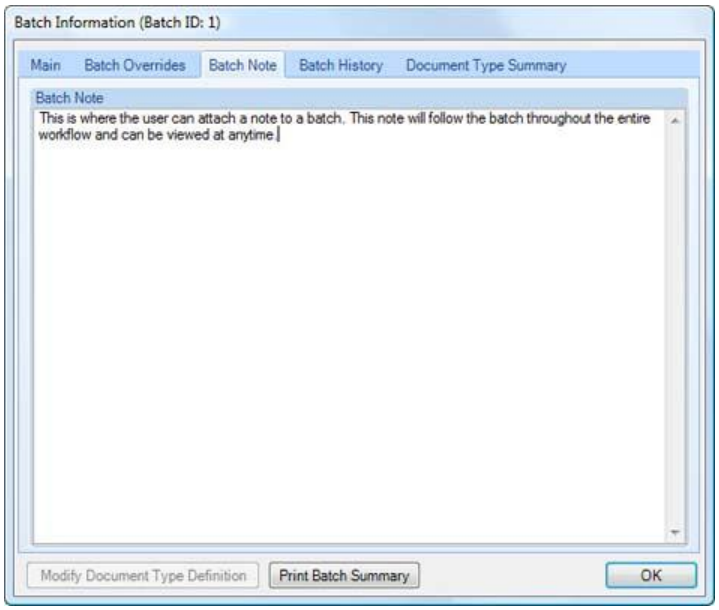


Batch Overrides

This tab is unavailable.

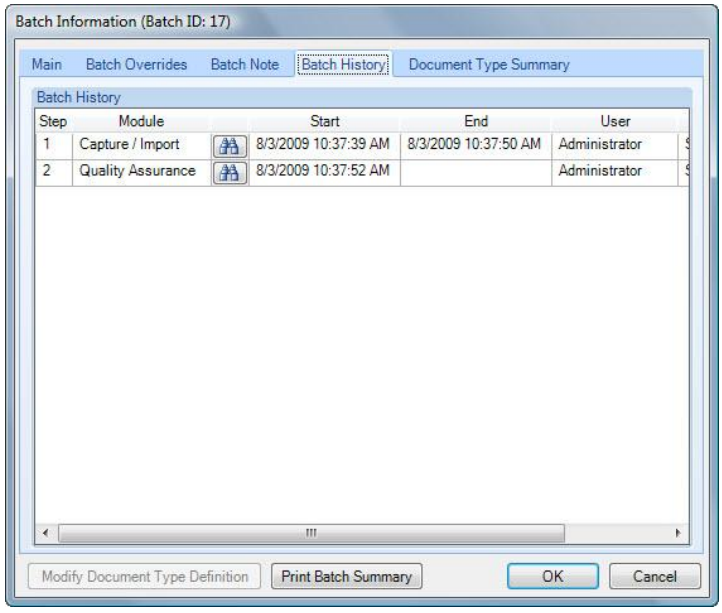
Batch Note

Allows the user to attach/view a note to the batch. The note will follow the batch throughout the entire workflow and can be viewed at anytime.

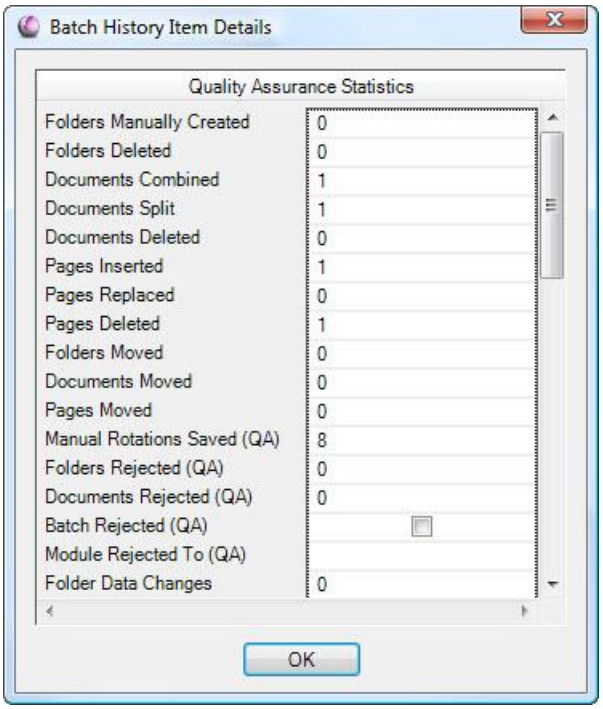

Batch Information (Batch ID: 1)
Main
Batch Overrides
Batch Note
Batch History
Document Type Summary
Batch Note
This is where the user can attach a note to a batch. This note will follow the batch throughout the entire workflow and can be viewed at anytime.
Modify Document Type Definition
Print Batch Summary
OK

Batch History

Shows the history of the batch with a date timestamp.

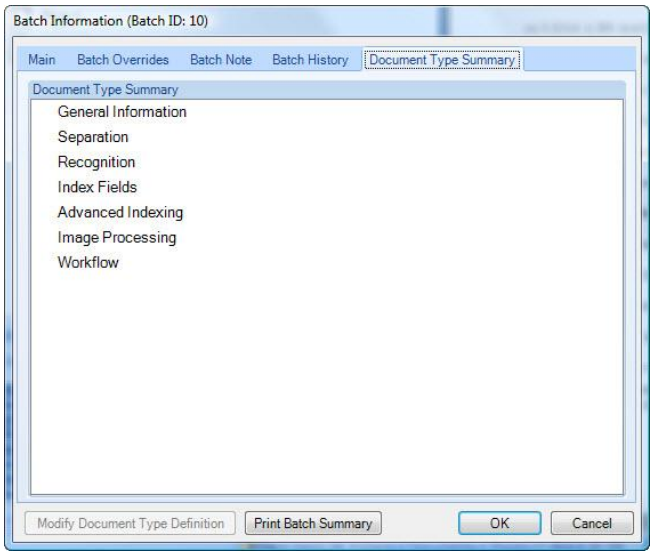


By clicking on the binocular icon the “Batch History Item Details” of the selected workflow step are shown.



Document Type Summary

A brief summary of the document type configuration settings presented in a tree structure.



Auto View

Automatically advances through pages for viewing. See “File – QA Settings” for more information.

Auto Orient Pages

Attempts to automatically orients all pages in the current Batch.

Toggle Index Data Editing

Enables and disables editing data in Data View. **NOTE:** “Allow Index Data to be edited” must be enabled in “Quality Assurance Settings”

Run Lookups

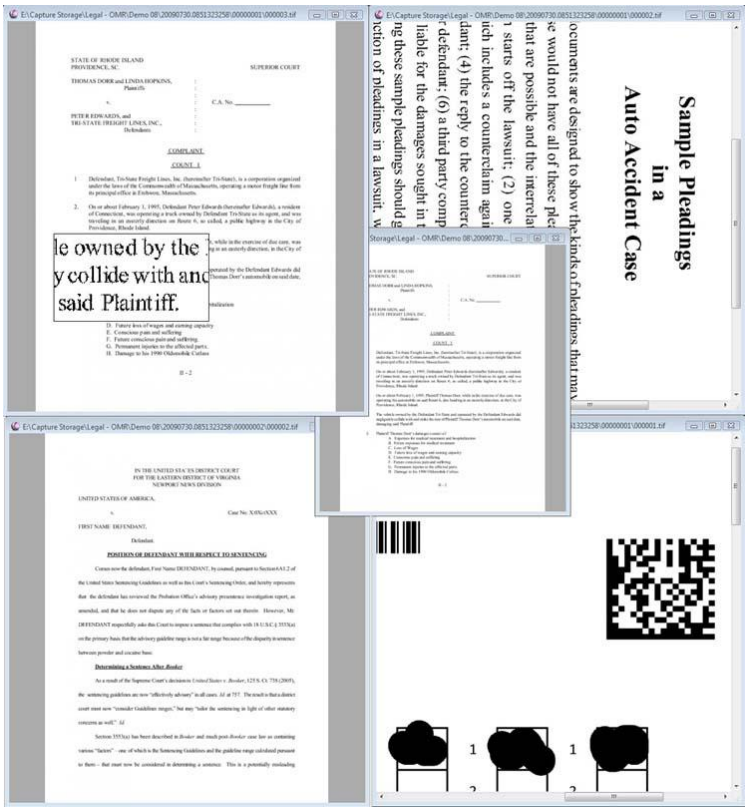
Used in data view to perform data lookup to populate/update index fields.

Toggle Thumbnail Viewer

Pages are viewed as thumbnails in the Image Viewer Pane.

Open New Viewer

Opens a new viewer in the Image Viewer Pane. Multiple viewers may be opened simultaneously. Various viewers may display different pages, as well as be adjusted using the viewer tools (i.e. zoom, rotate, magnify). See “Viewing Toolbar” for more details.



Data View Records Display

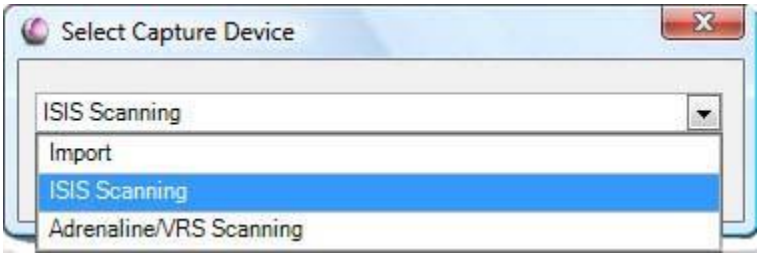
Lets user chose whether to show folder and/or document records in data view.

Print

Prints the current page.

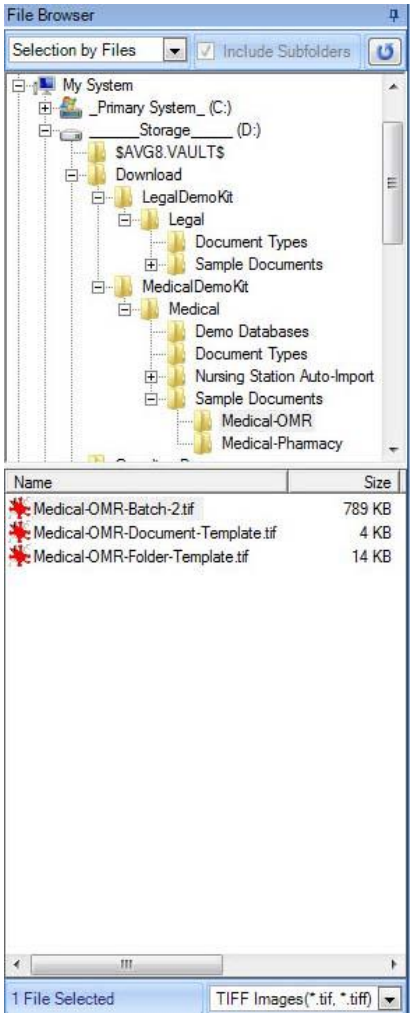
Select Capture Device

Allows the selection of Import, ISIS or Adrenaline/VRS Scanning as the designated capture device.



Import

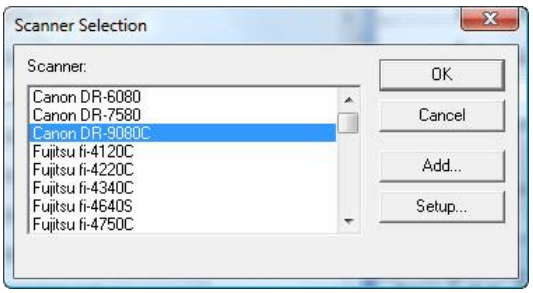
This selection adds the Upper and Lower File Browser Panes to the PSI:Capture interface.



ISIS Scanning

Scanner Selection

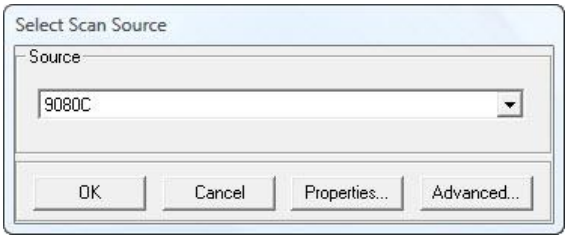
User is prompted to select a scanner.



Adrenaline/VRS Scanning

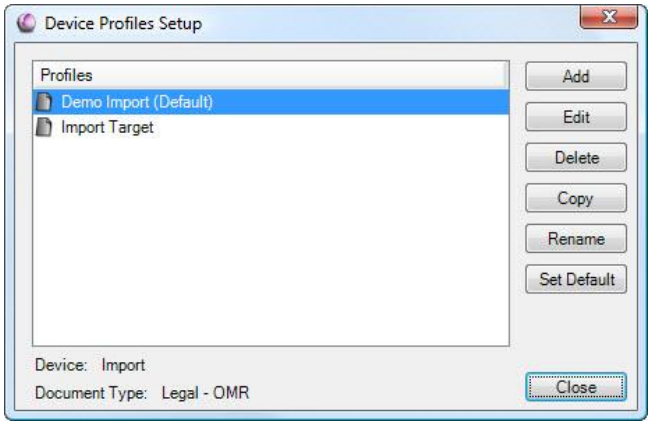
Select Scan Source

User is prompted to select a scanner. The population of this list reflects the hardware installed on the workstation.



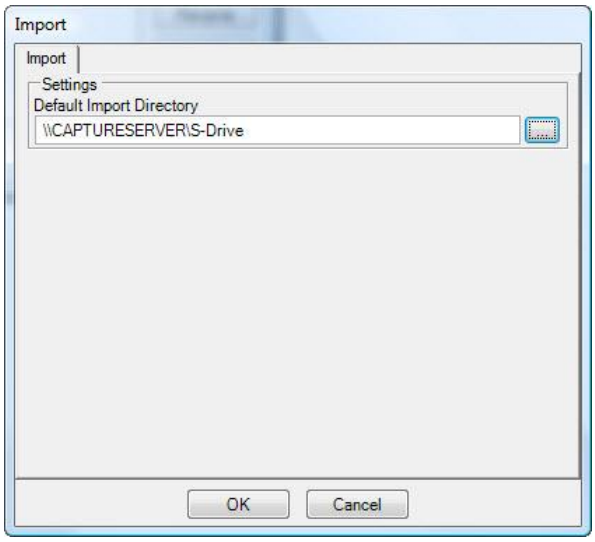
Configure Device Profiles

Device Profiles Setup (Import)



Add

Creates a new import profile. Sets a default local folder, mapped drive, or network folder where images to be captured are located. **NOTE:** selecting a network folder by using the Browse button\Network\Computer\share will place the UNC path in the “Default Import Directory” field. It is Strongly suggested that you use UNC paths when running in a “Capture Server” / “Network Station” environment.



Edit

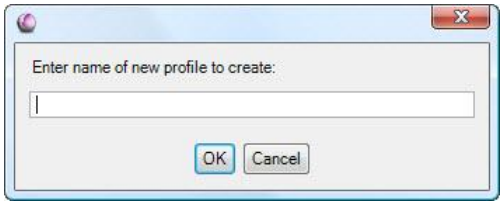
Changes an existing import profile.

Delete

Deletes an existing import profile.

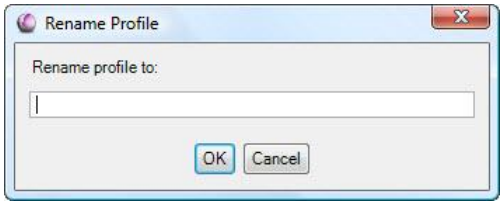
Copy

Duplicates an existing import profile and prompts the user to name the new profile.



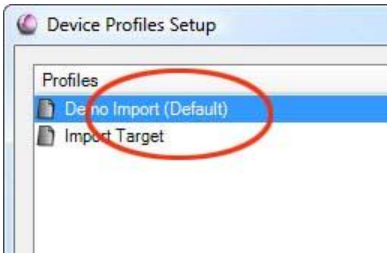
Rename

Allows user to rename an existing import profile.



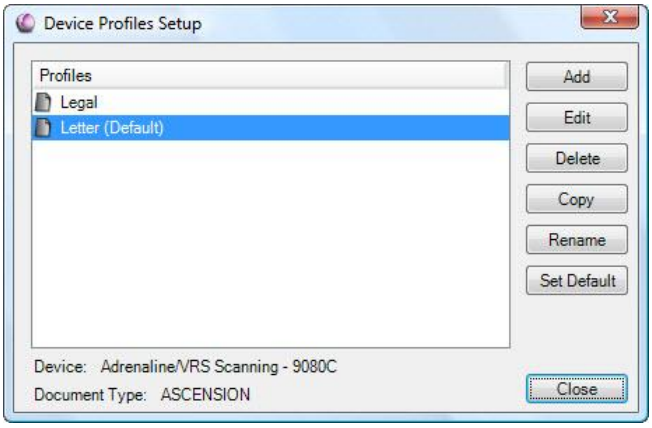
Set Default

Designates the Default import profile the capture module loads when opened.



Close

Exits the Device Profile Setup dialog box.



Device Profiles Setup (Scanning)

Allows for the creation of device profiles for capture device settings. For scanners, driver settings can be configured and named for quick recall during capture operations. For the Import Device, folder paths can be specified for quick access to image directories. **NOTE:** the profile settings are independent on each document type, device, and scan station.

Add

Creates a new scan profile.

Edit

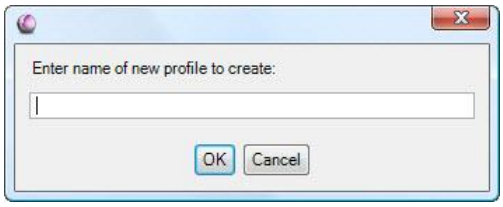
Changes an existing scan profile, including paper size, resolution, color level, etc. These parameters are device specific.

Delete

Deletes an existing scan profile.

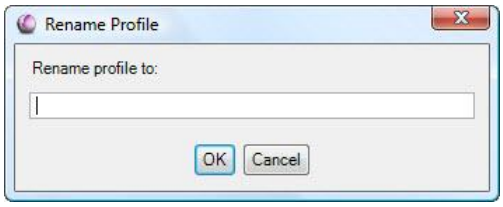
Copy

Duplicates an existing scan profile and prompts the user to name the new profile.



Rename

Allows user to rename an existing scan profile.



Set Default

Designates the Default scan profile the capture module loads when opened.

Close

Exits the Device Profile Setup dialog box.

Import/Export Device Profiles

Enables user to export/import a device profile on a workstation, and import/export that profile on alternate an alternate workstation. Because device profiles are unique on each workstation this is often helpful.

Import/Export

Select either import or export of profile(s).

Device Selection

Select Import, ISIS Scanning, or Adrenaline/VRS Scanning.

Profile Storage

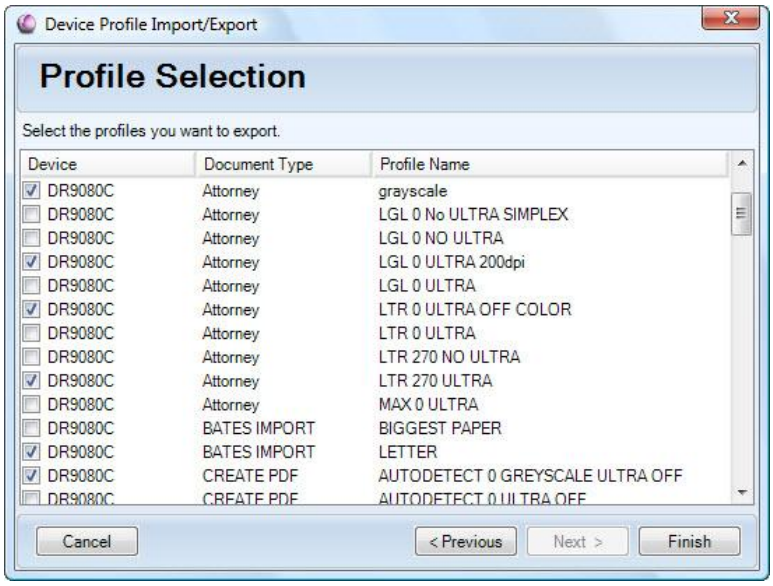
Select Integrated “Capture Server Storage” (recommended for multi station deployment) or “Custom Location” (allows user to specify location to store the profiles).

Click “Next” to proceed once selections are made.

Profile Selection

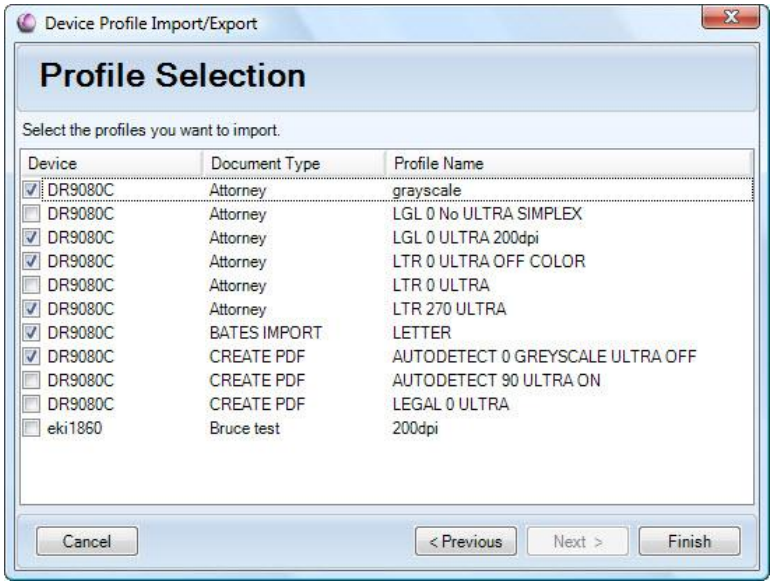
Export

User can click on one or multiple checkboxes of existing profiles for export.


Device Profile Import/Export
Profile Selection
Select the profiles you want to export.
Device
Document Type
Profile Name
DR9080C Attorney grayscale
DR9080C Attorney LGL 0 No ULTRA SIMPLEX
DR9080C Attorney LGL 0 NO ULTRA
DR9080C Attorney LGL 0 ULTRA 200dpi
DR9080C Attorney LGL 0 ULTRA
DR9080C Attorney LTR 0 ULTRA OFF COLOR
DR9080C Attorney LTR 0 ULTRA
DR9080C Attorney LTR 270 NO ULTRA
DR9080C Attorney LTR 270 ULTRA
DR9080C Attorney MAX 0 ULTRA
DR9080C BATES IMPORT BIGGEST PAPER
DR9080C BATES IMPORT LETTER
DR9080C CREATE PDF AUTODETECT 0 GREYSCALE ULTRA OFF
Cancel
< Previous
Next >
Finish

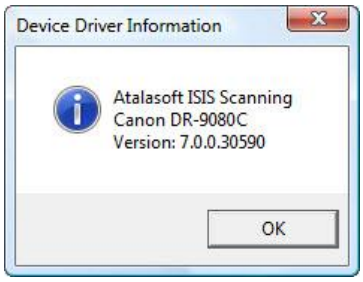
Import

User can click on one or multiple checkboxes of previously exported profiles for import.


Device Profile Import/Export
Profile Selection
Select the profiles you want to import.
Device
Document Type
Profile Name
DR9080C Attorney grayscale
DR9080C Attorney LGL 0 No ULTRA SIMPLEX
DR9080C Attorney LGL 0 ULTRA 200dpi
DR9080C Attorney LTR 0 ULTRA OFF COLOR
DR9080C Attorney LTR 0 ULTRA
DR9080C Attorney LTR 270 ULTRA
DR9080C BATES IMPORT LETTER
DR9080C CREATE PDF AUTODETECT 0 GREYSCALE ULTRA OFF
DR9080C CREATE PDF AUTODETECT 90 ULTRA ON
DR9080C CREATE PDF LEGAL 0 ULTRA
eki1860 Bruce test 200dpi
Cancel
< Previous
Next >
Finish

Device Driver Information

Provides information on the device driver. Information is unique per application.

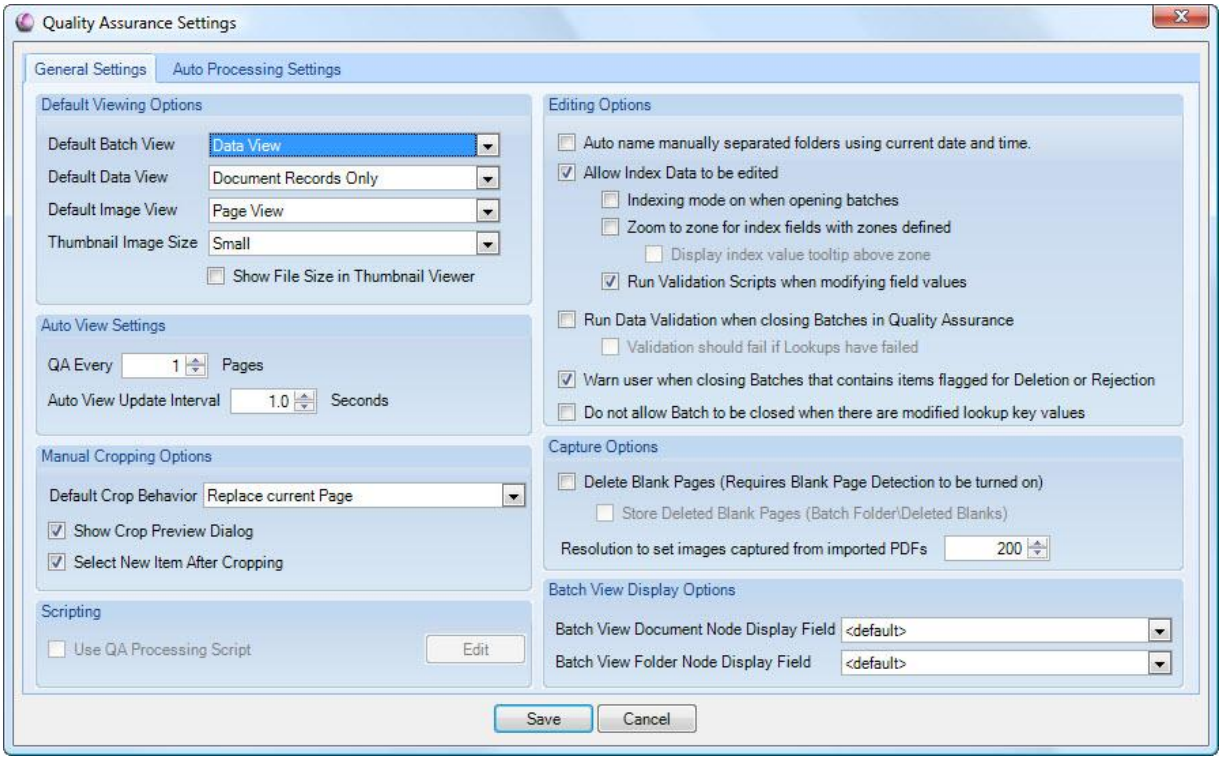


QA Setup

Brings up the "Quality Assurance Settings" dialog box. **NOTE:** All settings should be defined previously by the system administrator. However, some QA operators may wish to make adjustments to the individual batch's settings to suit their needs.

Quality Assurance Settings

See "Quality Assurance Workflow Configuration" in "Document Type Configuration (Step 8 of 9)" in the Administrative guide for more details.


Quality Assurance Settings
General Settings
Auto Processing Settings
Default Viewing Options
Default Batch View
Data View
Default Data View
Document Records Only
Default Image View
Page View
Thumbnail Image Size
Small
Show File Size in Thumbnail Viewer
Auto View Settings
QA Every
1
Pages
Auto View Update Interval
1.0
Seconds
Manual Cropping Options
Default Crop Behavior
Replace current Page
Show Crop Preview Dialog
Select New Item After Cropping
Scripting
Use QA Processing Script
Edit
Editing Options
Auto name manually separated folders using current date and time.
Allow Index Data to be edited
Indexing mode on when opening batches
Zoom to zone for index fields with zones defined
Display index value tooltip above zone
Run Validation Scripts when modifying field values
Run Data Validation when closing Batches in Quality Assurance
Validation should fail if Lookups have failed
Warn user when closing Batches that contains items flagged for Deletion or Rejection
Do not allow Batch to be closed when there are modified lookup key values
Capture Options
Delete Blank Pages (Requires Blank Page Detection to be turned on)
Store Deleted Blank Pages (Batch Folder\Deleted Blanks)
Resolution to set images captured from imported PDFs
200
Batch View Display Options
Batch View Document Node Display Field
<default>
Batch View Folder Node Display Field
<default>
Save
Cancel

General Settings

Default Viewing Options

Sets the default setting for batch/data/image view and thumbnail image size.

Auto Viewing Settings

Sets the page and time intervals for QA Auto View. A setting of 0.5 seconds is common for the average user.

Manual Cropping Options

Sets PSI:Capture's behavior while performing manual cropping. Common settings include replace or insert page before/after current page.

Scripting

See "Scripting" in Administrative Users manual for details.

Editing Options

Contains numerous checkboxes pertaining to index data editing and validation.

Capture Options

Provides the user with options to enable blank page deletion/retention, and change the resolution to captured images imported from PDFs.

Batch View Display Options

Changes default document/folder node display fields in data view.

Auto Processing Settings

Lists the available automatic processing commands in the left column. Lists the automatic processing commands currently in use in the right column. Each command can be configured individually.

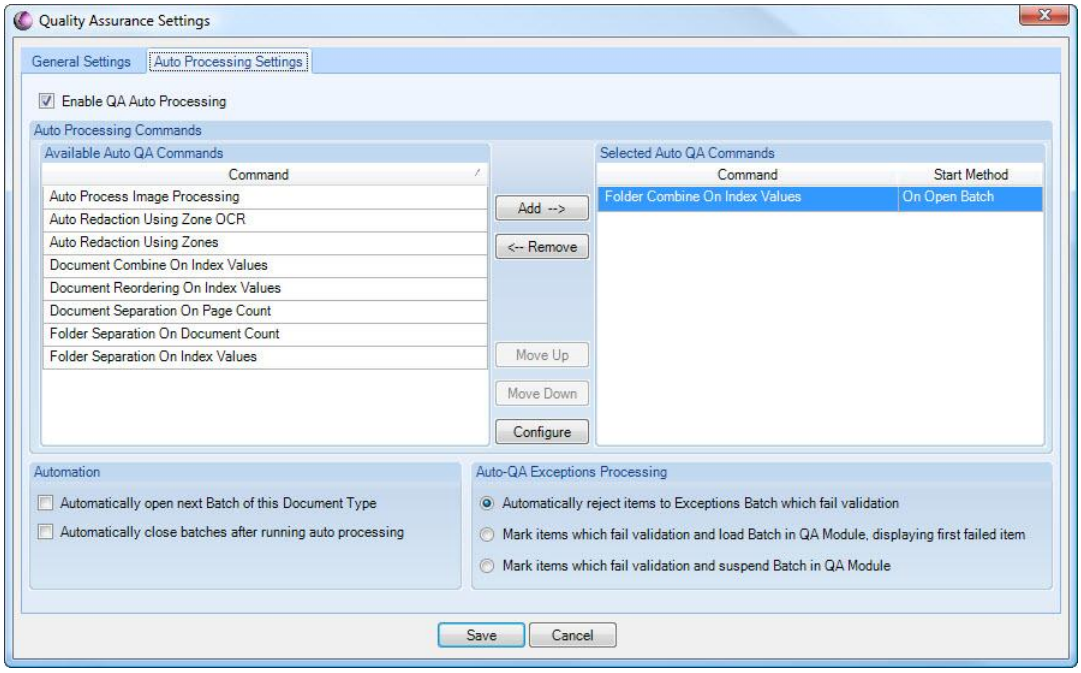
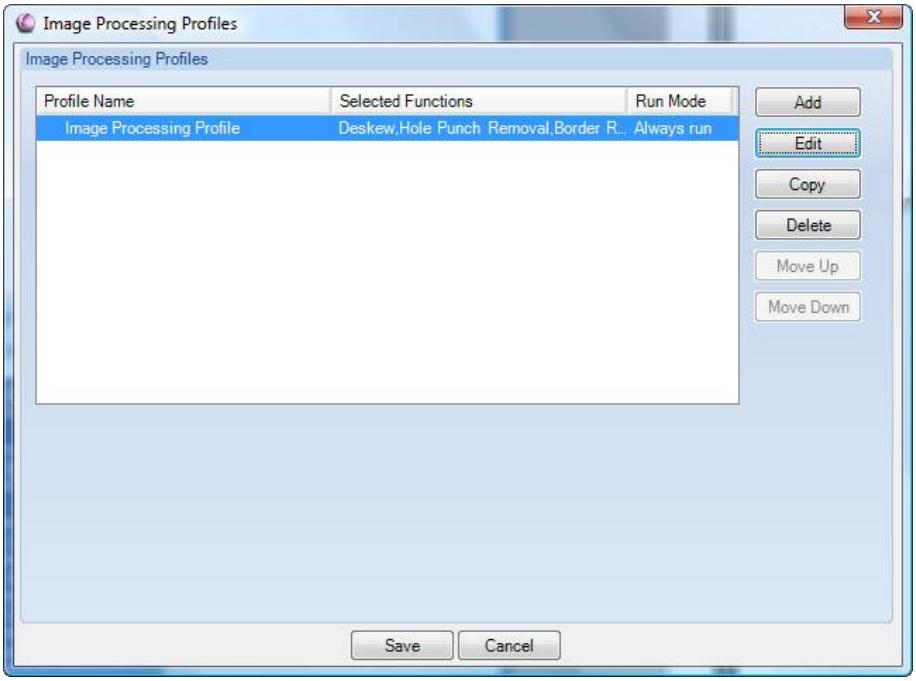
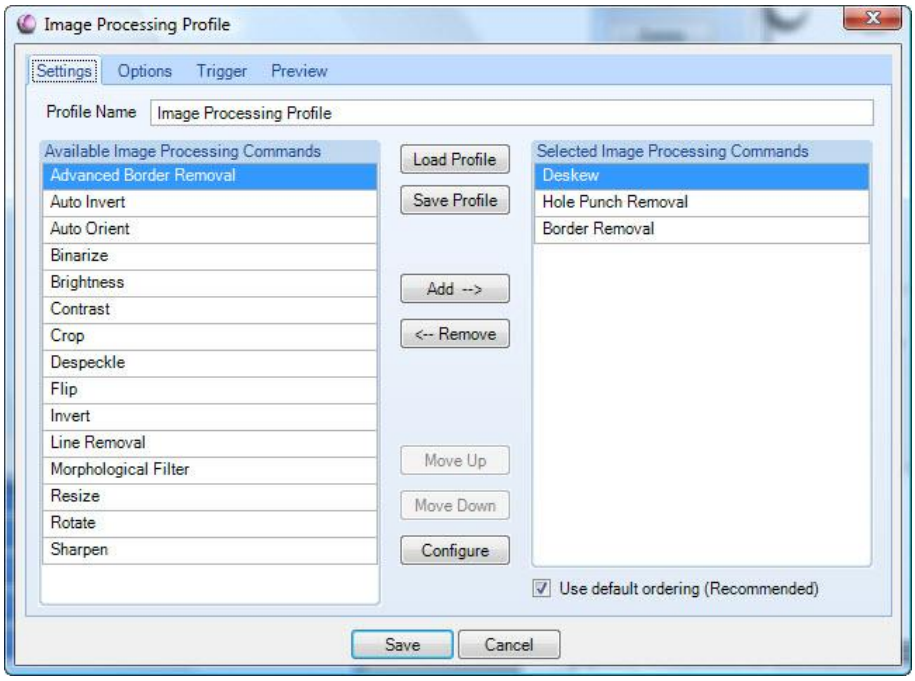

Quality Assurance Settings
General Settings
Auto Processing Settings
Enable QA Auto Processing
Auto Processing Commands
Available Auto QA Commands
Command
Auto Process Image Processing
Auto Redaction Using Zone OCR
Auto Redaction Using Zones
Document Combine On Index Values
Document Reordering On Index Values
Document Separation On Page Count
Folder Separation On Document Count
Folder Separation On Index Values
Add -->
<-- Remove
Move Up
Move Down
Configure
Selected Auto QA Commands
Command
Start Method
Folder Combine On Index Values
On Open Batch
Automation
Automatically open next Batch of this Document Type
Automatically close batches after running auto processing
Auto-QA Exceptions Processing
Automatically reject items to Exceptions Batch which fail validation
Mark items which fail validation and load Batch in QA Module, displaying first failed item
Mark items which fail validation and suspend Batch in QA Module
Save
Cancel

Image Processing Options

Brings up the “Image Processing Profiles” dialog box where various profiles are listed. A new profile can be added, or an existing profile edited/enabled/disabled. **NOTE:** All settings should be defined previously by the system administrator. However, some QA operators may wish to make adjustments to the settings to suit the needs of a particular batch or page.



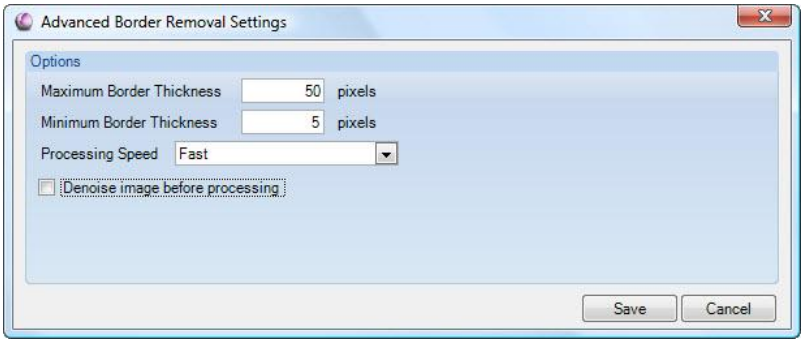
When “Edit” is selected, the “Image Processing Profile” dialog box is displayed. Various image processing commands can be added, removed, or reconfigured.



The user may select any of the appropriate image processing functions by adding them to the right side. It is highly recommended that the “**Use default ordering”** be checked.

The following image enhancement processes are available:

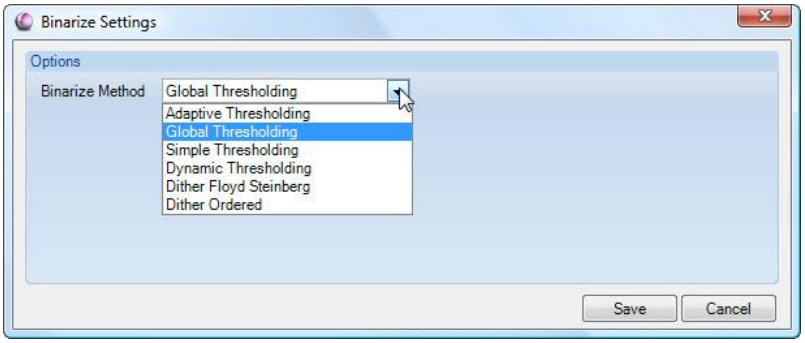
Advance Border Removal: Automatically removes black/white borders from an image using a sophisticated object detection algorithm.



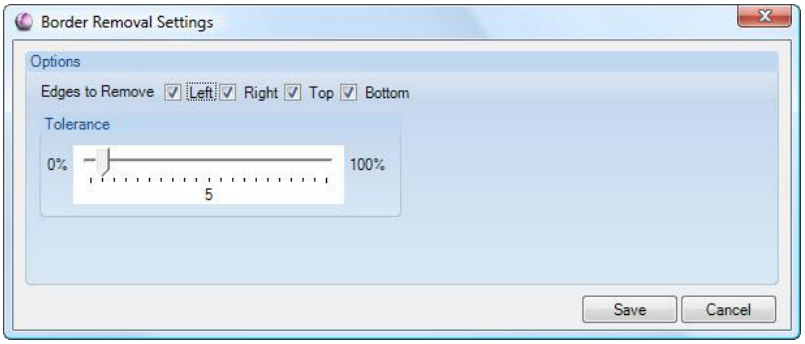
Auto Invert: Change from white on black to black on white and vice versa

Auto Orient: Attempts to determine the orientation of an image and then save it.

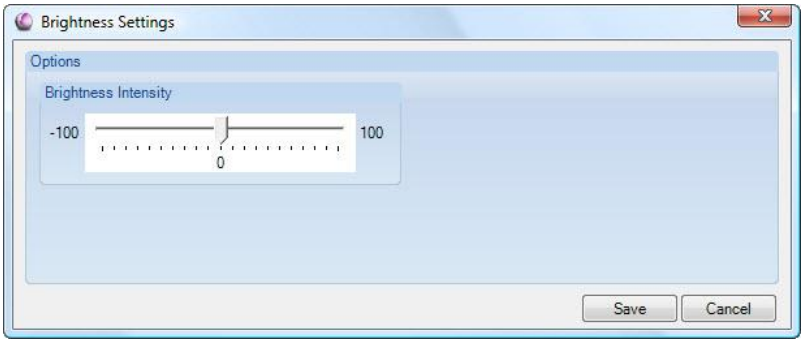
Binarize: Converts a grayscale or color image to black and white using the selected Binarize method.



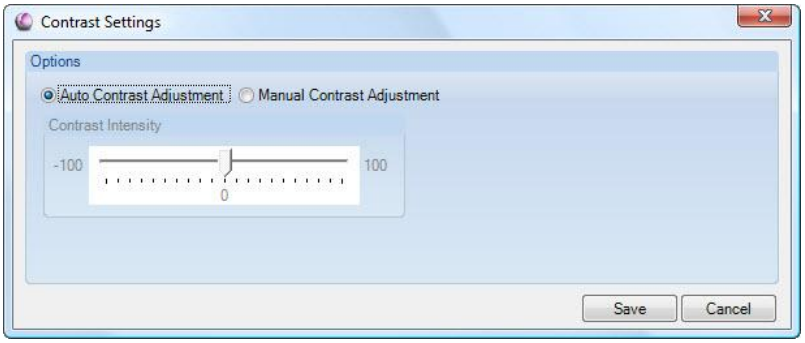
Border Removal: Removes solid borders from images. (do not use if using Advance Border Removal)



Brightness: Modifies the Brightness of a grayscale or color image.

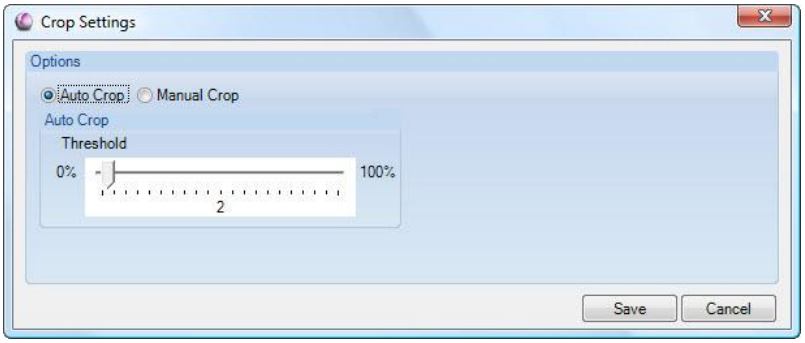


Contrast: Either automatically using the built in algorithm or manually using the slide bar provided modifies the Contrast of a grayscale or color image

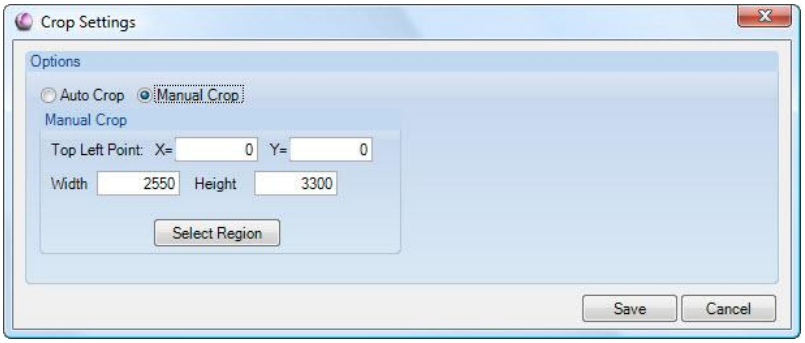


Crop: Allows an image to be either manually cropped or automatically cropped.

Auto Crop will crop an image by removing solid color borders around the edge of an image.



Manual Crop allows users to set a region on an image to be cropped.

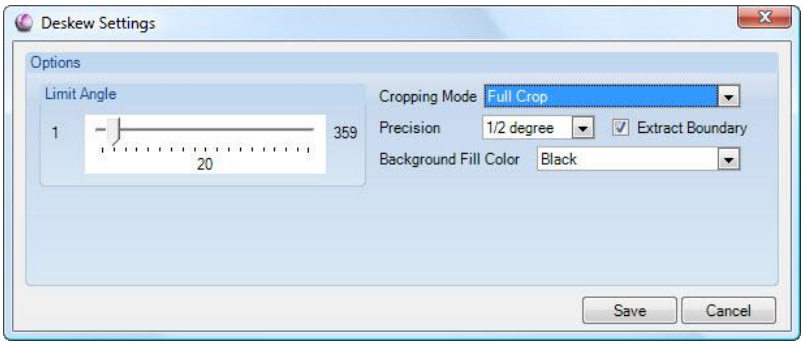


De-skew: Automatically deskews an image.

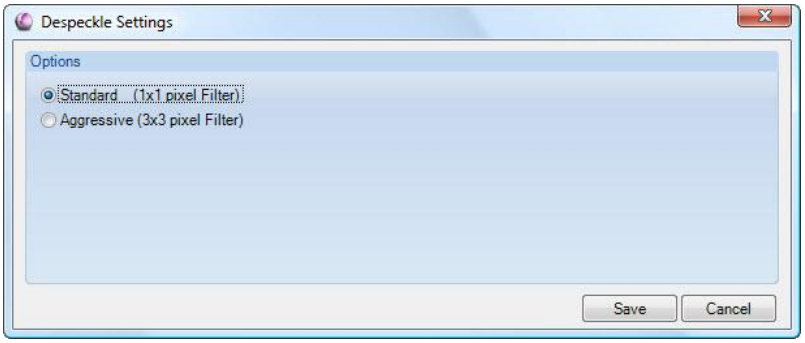
Cropping Mode: None, Original Size or Full Crop

Precision: can be set from 1/10 to 1 degree

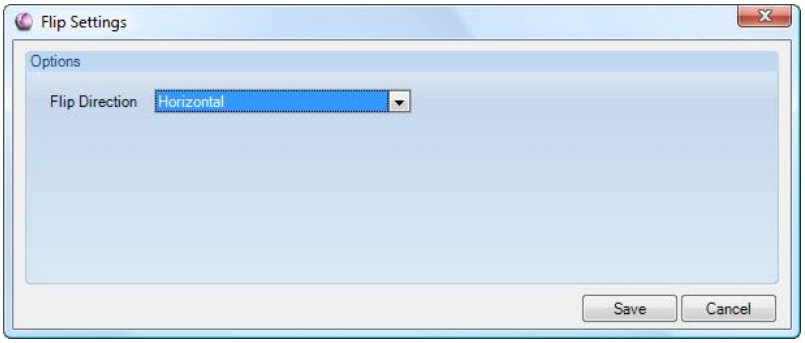
Background Fill Color: Black or White



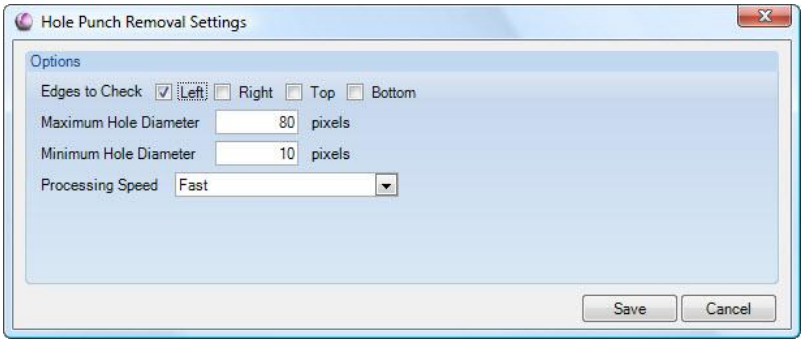
De-speckle: This command cleans the image of small speckles by using either a Standard (1 x 1 pixel) or Aggressive (3 x 3) filter.



Flip: Flips an image either horizontally or vertically. (mirrored image)

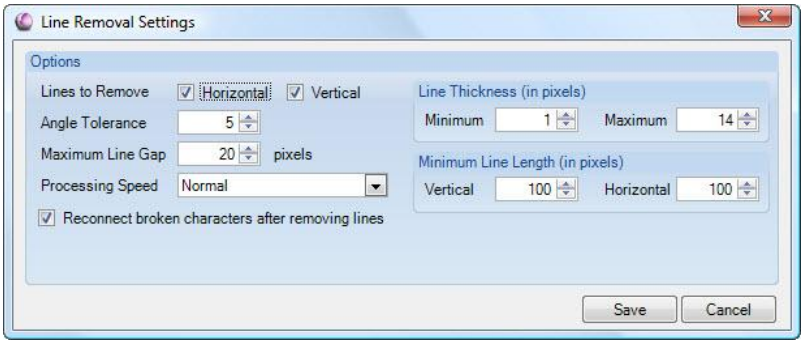


Hole Punch Removal: This command is used when scanning to a black background and the desired result is to have the hole punches be white or filled in.



Invert: This command is used when an image appears with a black background with white writing and the desired result is a white background with black writing.

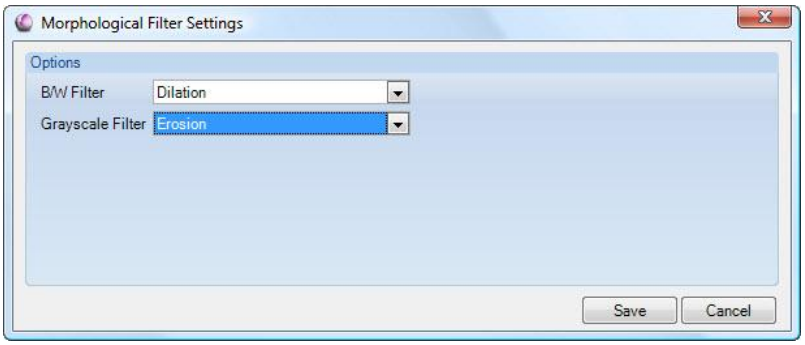
Line Removal: This command is used to remove lines and may be especially helpful during zone OCR.



Morphological Filters: Processes incoming images with one of the following filters:

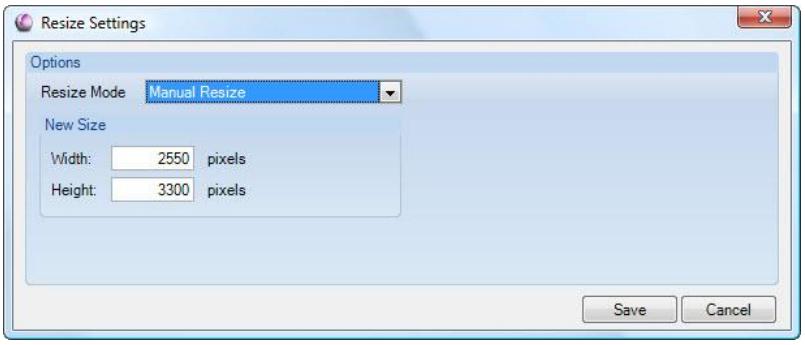
1. **Dilation**: Used to smooth small dark regions tending to enhance black features in the image. (Darken)
2. **Erosion**: Used to smooth small light regions tending to reduce black features in the image. (Lighten)
3. **Open**: The dilation of the erosion of the image used to reduce small black regions within the image. (Deshade)
4. **Close**: The erosion of the dilation of the image used to reduce small white regions within the image. (Light Thicken)

5. **Boundary Extraction** (B/W only): Perform a boundary detection/extraction on a binary image. This will generate an outline of the foreground features of the input image.
6. **Thinning** (B/W only): Reduces the geometric size of an image, leaving only a skeletonized frame in its place.
7. **Top Hat** (Grayscale Only): Enhances low-contrast, high frequency details within an image.
8. **Gradient** (Grayscale Only): Highlights sharp gray-level transitions (edges) in an image.

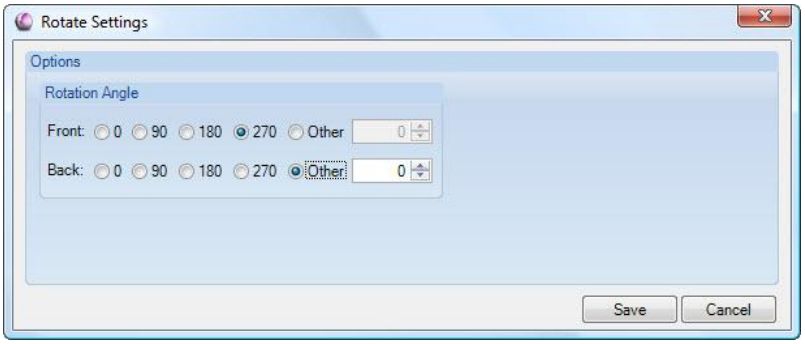


Resize: Allows image to be resized to a set of user defined dimensions.

Resize Mode: Allows Manual Resize, Maintain Aspect Ratio Using Width, or Maintain Aspect Ratio Using Height



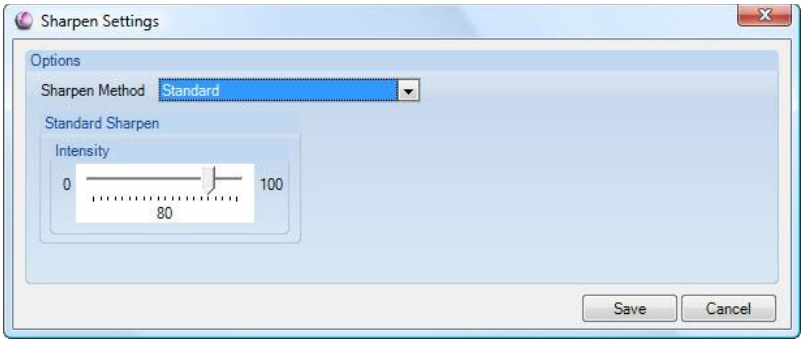
Rotate: Automatically rotates an image clockwise by 90-degree increments or by the user specified number of degrees.



Sharpen: Applies of the following sharpening filters to the image.

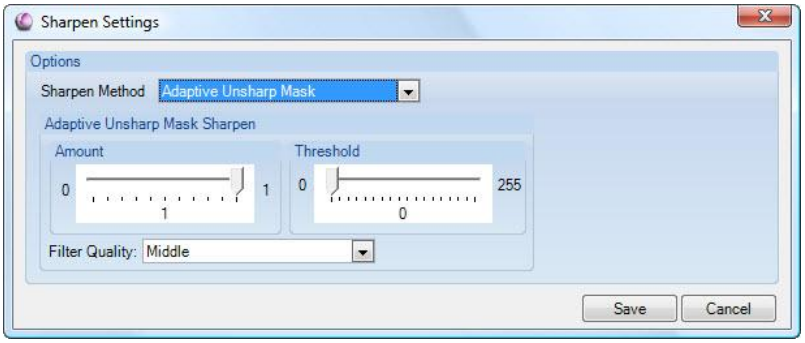
Sharpen Method

Standard



Unsharp Mask

Adaptive Unsharp Mask



Recognition Options

Brings up the “Recognition Settings” dialog box, where barcode, patch code, and black page detection can be configured. See “Recognition” in “Document Type Configuration (Step 4 of 9)” in the Administrative guide for more details.

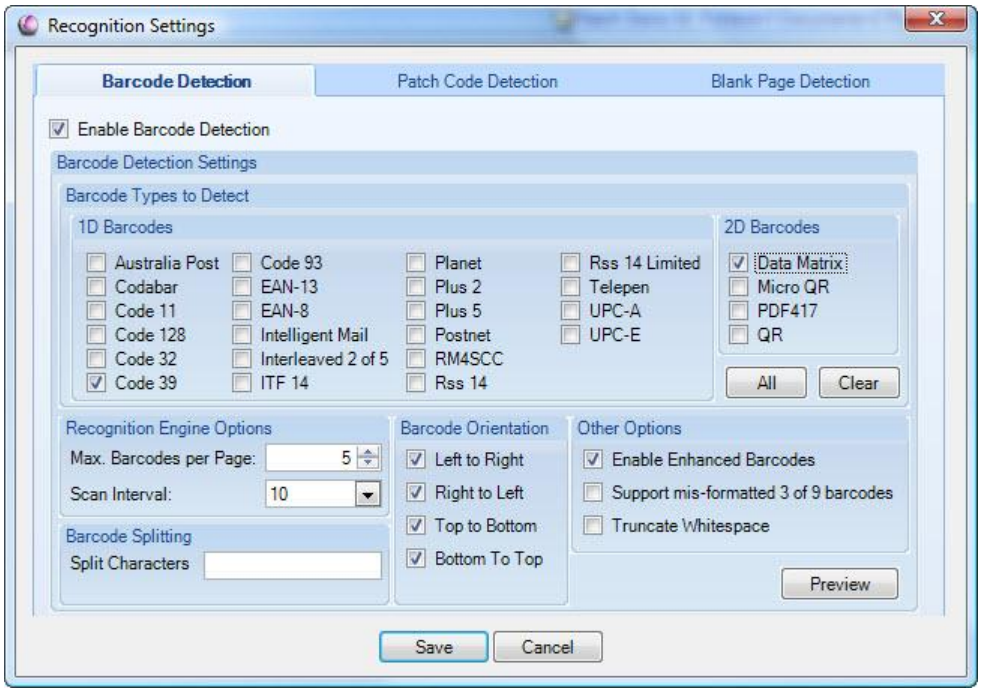
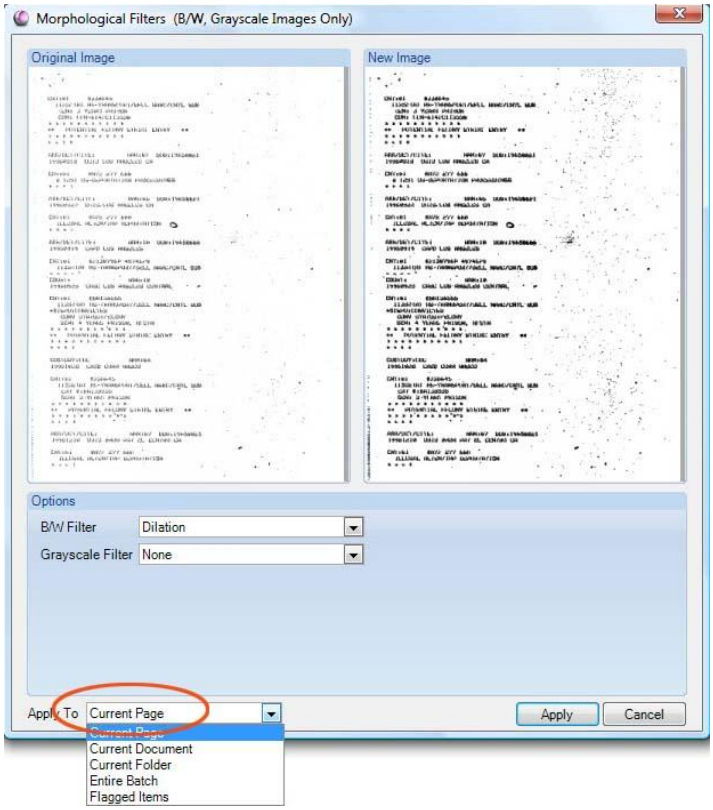


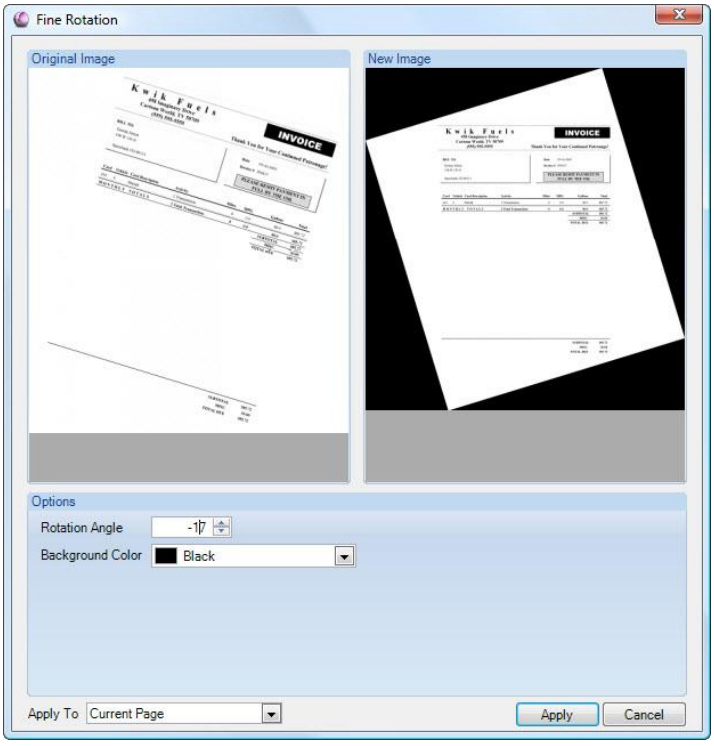
Image Processing

Allows user to easily perform individual image processing to a specific page, document, or folder.

Selecting any of the processes will bring up a preview window showing the original image and the new image. The drop down list allows user to apply the process to the current page, document, folder, entire batch, or flagged items. To accept the new image, user must then click Apply. Example below is of Morphological Filters (dilation).

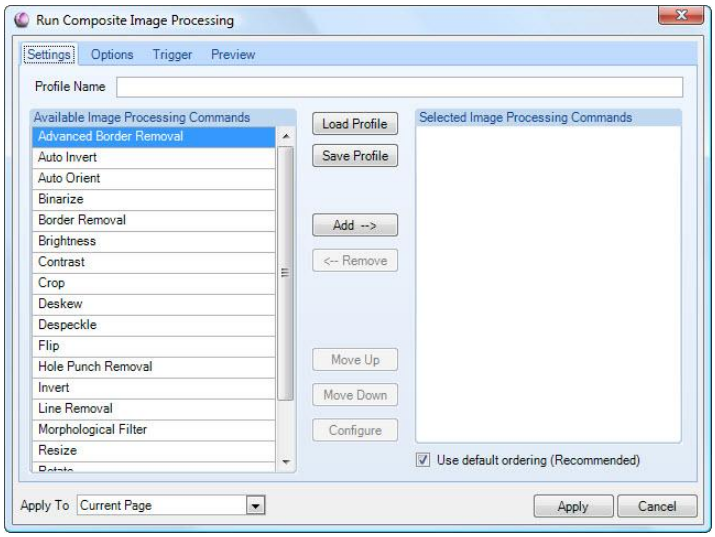


Fine Rotation: Rotates the image by the specified number of degrees (positive number for clockwise rotation and negative number for counter clockwise rotation).



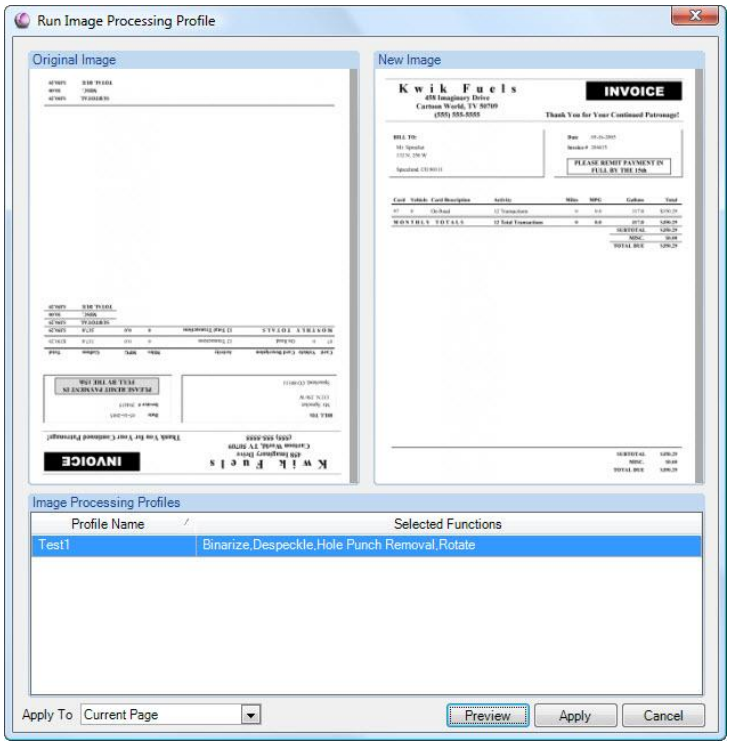
Composite Image Processing

Useful if user wants to perform multiple processes at a time. Combinations of processes can be saved for later use in different profiles.



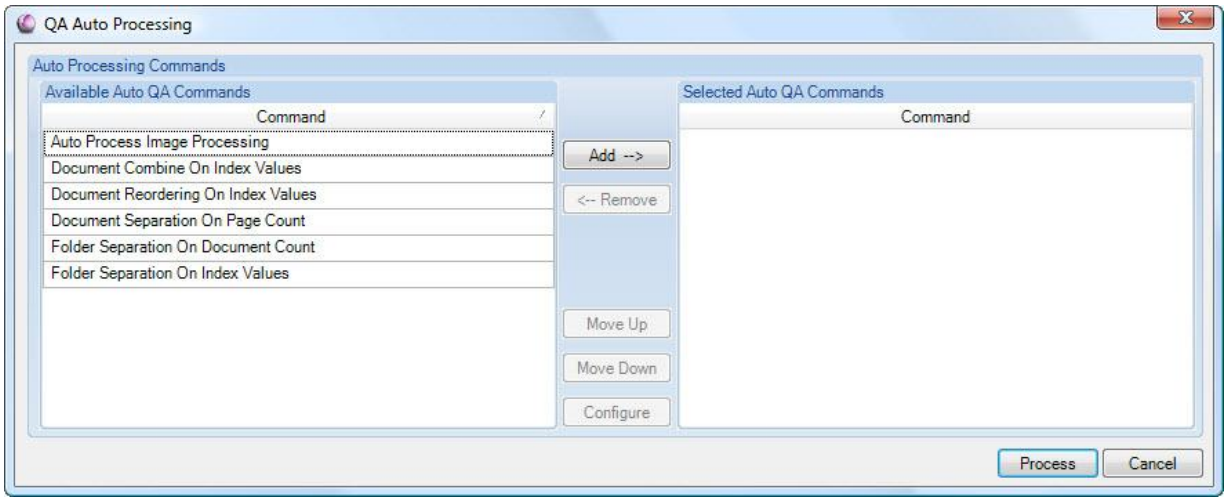
Run Image Processing Profile

Runs previously saved image processing profiles. Shows original image, new image, and all saved profiles and their functions.



QA Auto Processing

Sets up automatic processing commands on index values. See “Auto Processing Settings” in "Document Configuration (Step 8 of 9)" in the Administrative Guide for more details.



Close Module

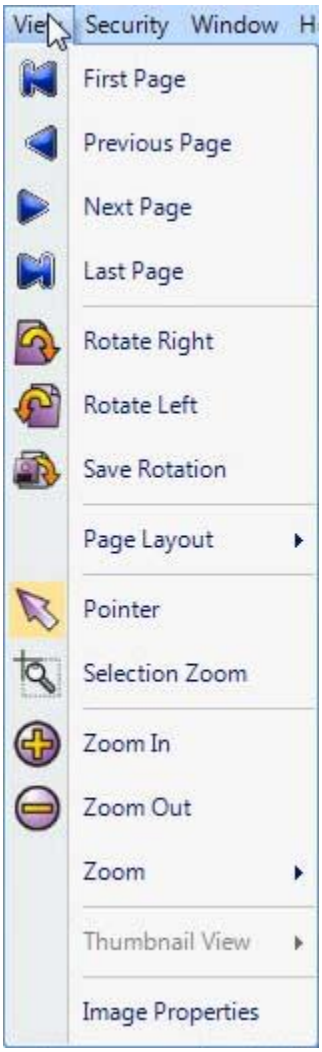
Closes the Quality Assurance Module. **NOTE:** If a batch is currently open, user will be prompted to close or suspend the batch. PSI: Capture will remain open.

Exit

Exits out from PSI:Capture. **NOTE:** If a batch is currently open, user will be prompted to close or suspend the batch. The PSI:Capture application will then end.

View

Contains numerous commands relevant to page viewing and navigation in the Quality Assurance module and the current batch.



First Page

Jumps to the first page of the document.

Previous Page

Jumps to the page before the current page.

Next Page

Jumps to the page after the current page.

Last Page

Jumps to the last page of the document.

Rotate Right

Provides the ability to rotate the document right. **NOTE**: you must click on the save rotation button to save your changes to the page.

Rotate Left

Provides the ability to rotate the document left. **NOTE**: you must click on the save rotation button to save your changes to the page.

Save Rotation

Saves the current rotated page.

Page Layout

Simplex

The standard method of viewing, this shows one page at a time in the “Viewing Pane.”

Duplex

Shows two **consecutive** pages (top and bottom) in the “Viewing Pane.” This is useful to view the front and backside of the page simultaneously.

SONY CORP. OF AMER. v. UNIVERSAL CITY STUDIOS, INC., 464 U.S. 417 (1984)

STEVENS, J., delivered the opinion of the Court in which BURGER, C. J., and BRENNAN, WHITE, and O'CONNOR, JJ., joined. BLACKMUN, J., filed a dissenting opinion in which MARSHALL, POWELL, and REHNQUIST, JJ., joined, post, p. 457.

JUSTICE STEVENS delivered the opinion of the Court.

[1] Petitioners manufacture and sell home video tape recorders. Respondents own the copyrights on some of the television [p*420] programs that are broadcast on the public airwaves. Some members of the general petitioners video tape recorders sold by petitioners to record some of those broadcasts, as well as a large number of other broadcasts. The question presented is whether the sale of petitioners' copying equipment to the general public violates any of the rights conferred upon respondents by the Copyright Act.

[2] Respondents commenced this copyright infringement action against petitioners in the United States District Court for the Central District of California in 1976. Respondents alleged that some individuals had used Betamax video tape recorders (VTR's) to record some of respondents' copyrighted programs. Respondents sought relief that would require petitioners to manufacture VTR's, [n1] Respondents sought no relief against any Betamax customers. Instead, they sought monetary damages and an equitable accounting of profits from petitioners, as well as an injunction against the manufacture and marketing of Betamax VTR's.

[3] After a lengthy trial, the District Court denied respondents all the relief they sought and entered judgment for petitioners. 480 F.Supp. 429 (1979). The United States Court of Appeals for the Ninth Circuit reversed the District Court's judgment on respondents' copyright claim, holding petitioners liable for contributory infringement and ordering the District Court to fashion appropriate relief. 659 F.2d 963 (1981). Its decision conflicted with Kalem Co. v. Harper Brothers, 222 U.S. 55 (1911), [n2] and we had not considered any study of the case law. We reversed, and remanded, 461 U.S. 1124 (1983). We now reverse.

[4] An explanation of our rejection of respondents' unprecedented attempt to impose copyright liability upon the distributors of copying equipment requires a rather detailed recitation of the findings of the District Court. A summary of those findings reveals that this average member of the public uses a VTR principally to record a program he cannot view as it is being telecast and then to watch it once at a time later. This practice, known as "time-shifting," enlarges the television viewing audience. For that reason, a significant amount of the material copied is drawn from programs originally broadcast by respondents. Moreover, the copyrights on the programs. For the same reason, even the two respondents in this case, who do assert objections to time-shifting in this litigation, were unable to prove that the practice has impaired the commercial value of their copyrights or has curtailed any likelihood of future harm. Given these findings, there is no basis in the Copyright Act upon which

SONY CORP. OF AMER. v. UNIVERSAL CITY STUDIOS, INC., 464 U.S. 417 (1984)

respondents can hold petitioners liable for distributing VTR's to the general public. The Court of Appeals' holding to the contrary, and its remand for the fashioning of relief that enjoins or limits the sale of such equipment to obtain other relief, if affirmed, would enlarge the scope of respondents' statutory monopolies to encompass control over an subject of commerce that is not the subject of copyright protection. Such an expansion of the copyright privilege is beyond the limits of the grants authorized by Congress.

[5] The two respondents in this action, Universal City Studios, Inc., and Walt Disney Productions, produce and hold the copyrights to a substantial number of motion pictures and other audiovisual works. In the current marketplace, they can exploit their rights in those works in a number of ways. [p*422] By authorizing theatrical exhibitions, by licensing limited showings on cable and network television, by selling syndication rights for repeated airings on local television stations, and by marketing programs in prerecorded videotapes or videodiscs. Some works are suitable for exploitation through all of those avenues, while the market for other works is more limited.

[6] The two respondents in this action, Universal City Studios, Inc., and Walt Disney Productions, produce and hold the copyrights to a substantial number of motion pictures and other audiovisual works. In the current marketplace, they can exploit their rights in those works in a number of ways. [p*422] By authorizing theatrical exhibitions, by licensing limited showings on cable and network television, by selling syndication rights for repeated airings on local television stations, and by marketing programs in prerecorded videotapes or videodiscs. Some works are suitable for exploitation through all of those avenues, while the market for other works is more limited.

[7] Petitioner Sony manufactures millions of Betamax video tape recorders and markets them through numerous retail establishments, some of which are also petitioners in this action. [n3] Sony's Betamax VTR is a mechanism consisting of three basic components: (1) a tuner, which receives electromagnetic signals transmitted over the television band of the public airwaves and separates them into audio and visual signals; (2) a recorder, which converts those signals into a record of the program; and (3) a playback device, which plays and visual signals on the tape into a composite signal that can be received by a television set.

[8] Several capabilities of the machine are noteworthy. The separate tuner in the Betamax enables it to record a broadcast off one station while the television set is tuned to another station. Thus, a viewer can watch two programs at once by using the "Set" and recording the other. By watching one program while recording another, a viewer may be erased, and programs that have been recorded may be erased either before or after viewing. A timer in the Betamax can be used to activate and deactivate the equipment at predetermined [p*423] times, enabling an intended viewer to record programs that are transmitted when he or she is not at home. Thus a person may watch a program at home in his viewing even though it was broadcast while the viewer was at work during the afternoon. The Betamax is also equipped with a pause button that makes it possible to omit certain portions of a program broadcast while the recorder until it is released, thus enabling a viewer to omit a commercial advertisement from the recording, provided, of course, that the viewer is present when the program is recorded. The fast-forward control enables the viewer of a previously recorded program to rewind tape rapidly when a segment he or she does not desire to see is being played back or

Pointer

Changes the mouse cursor back to the pointer (from “Zoom” or “Magnifier”)

Selection Zoom

Click and drag with your left mouse button to zoom in on a selected area on the image. To bring the image back to full size, double right-click.

Zoom In

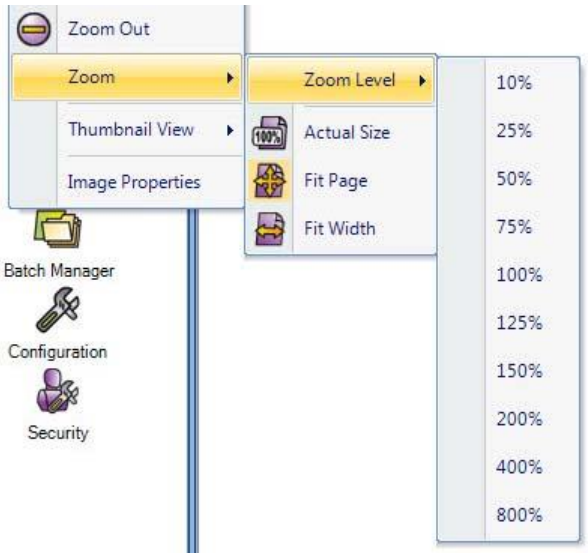
Provides zoom in capability.

Zoom Out

Provides zoom out capability.

Zoom

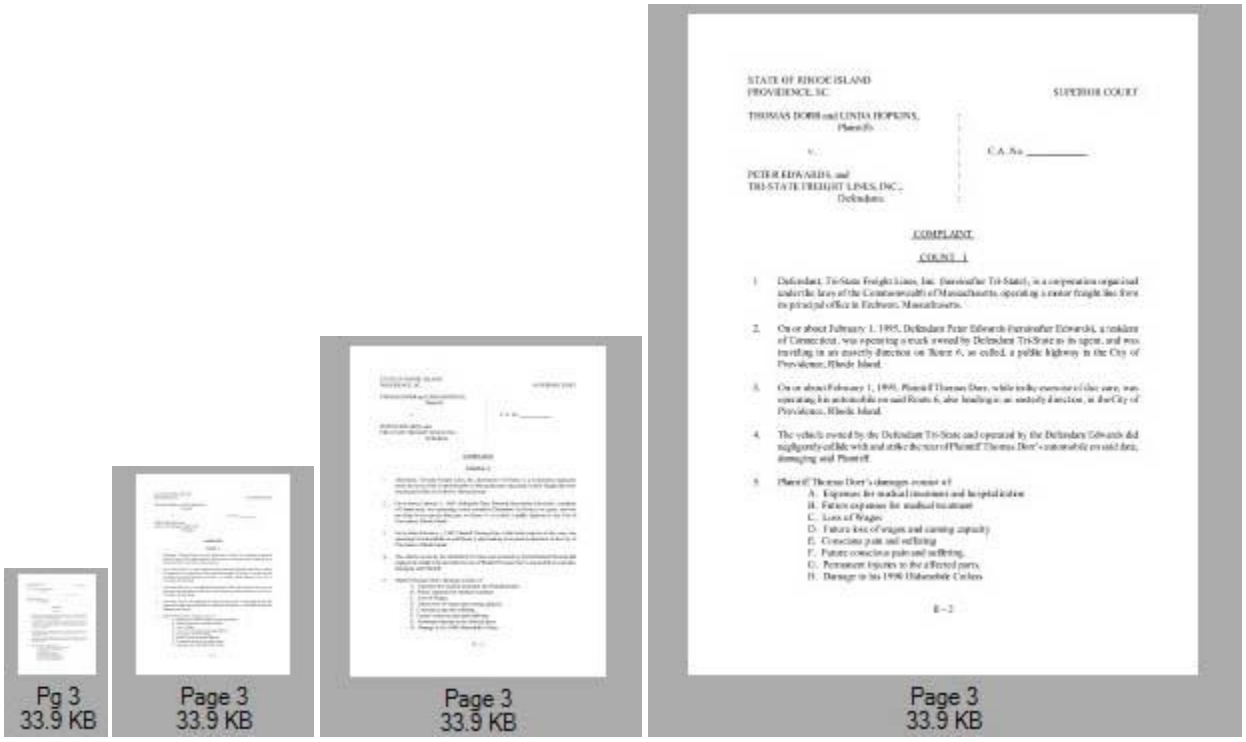
Provides a menu for actual size, fit page, fit width and zoom levels.



Thumbnail View

Select this option to change the size of thumbnail images displayed in the Thumbnail Viewer Pane. **NOTE:** "Toggle Thumbnail Viewer" must be enabled.

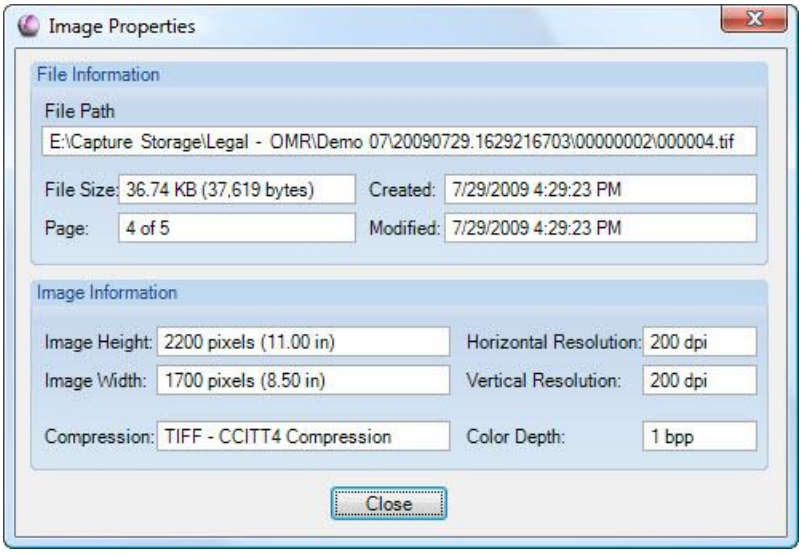
Thumbnail Image Sizes:



Smallest Small Medium Large

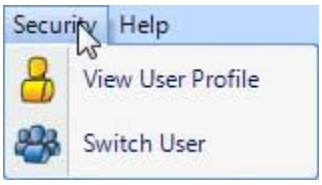
Image Properties

Displays file and image information about the current page.



Security

Contains commands relevant to security in PSI:Capture.



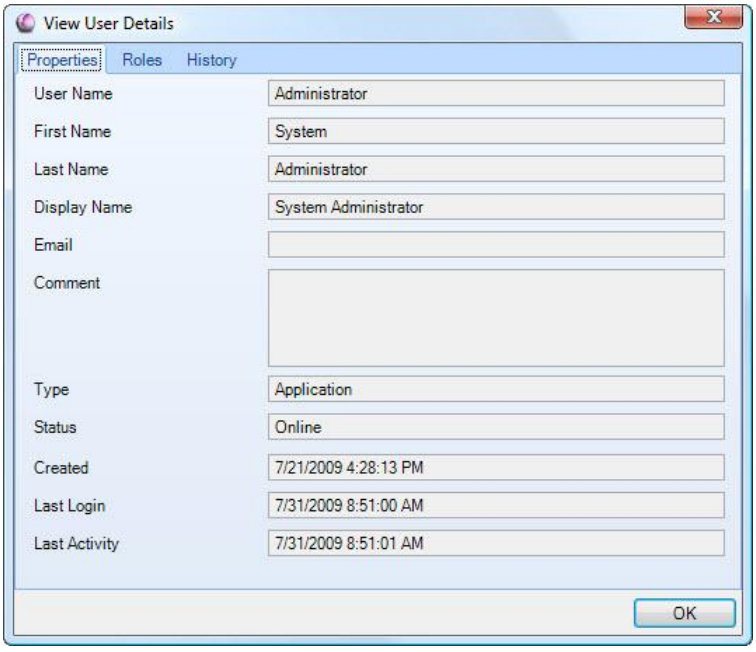
View User Profile

Opens the View User Details dialog box.

View User Details

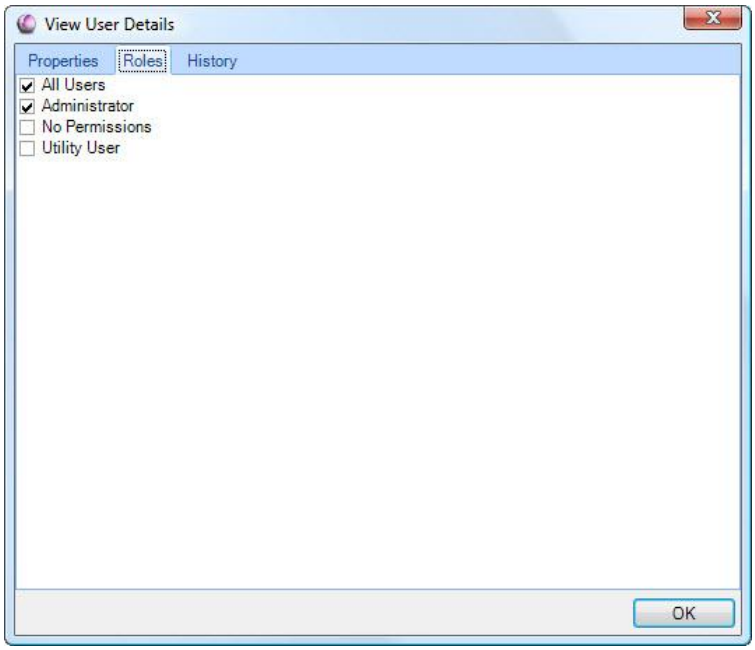
Properties

Displays details about the current user.



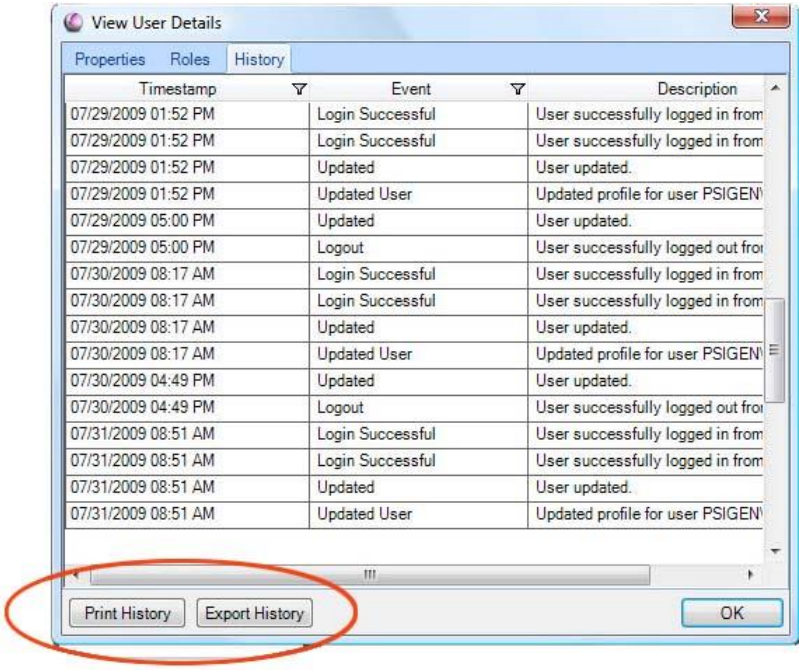
Roles

Displays the current user's role settings as dictated by the administrator. See "Roles" in "Security Module" in the User Manual.



History

Displays the history of the user's login activity in PSI:Capture.

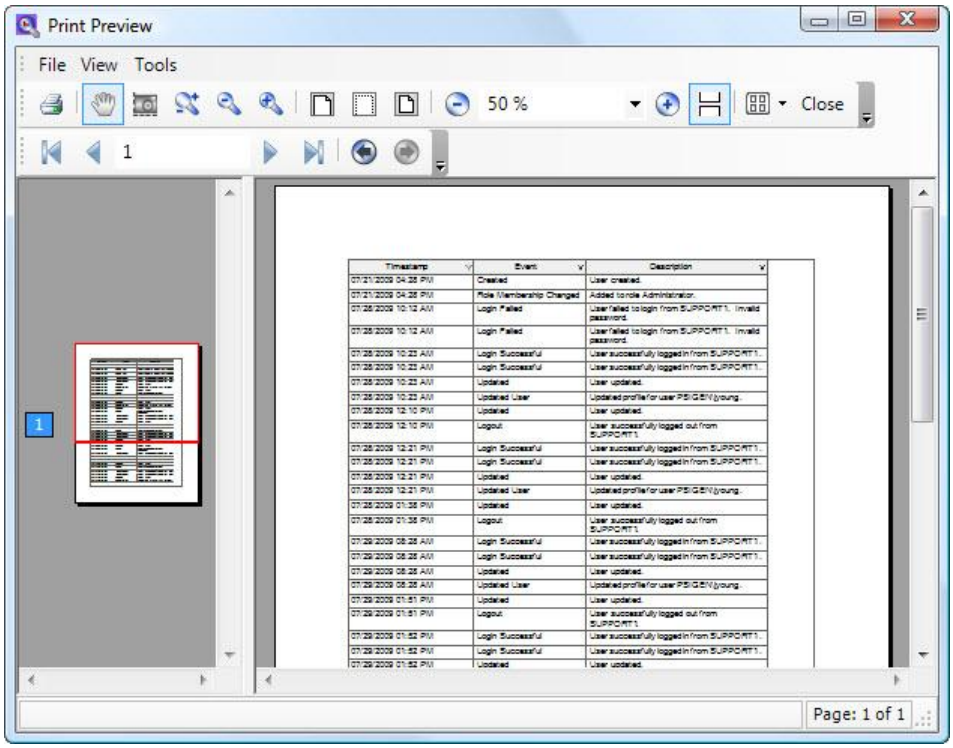


Print History

Opens the Print Preview window.

Print Preview

Displays the standard functions for viewing and printing, such as zoom options and page setup.

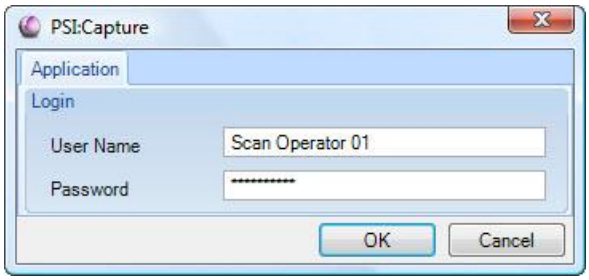


Export History

Exports the login history in a Microsoft Excel Workbook file. This allows user to save the log to a desired location.

Switch User

Logs out the current user out from the PSI:Capture and allows an alternate log in.

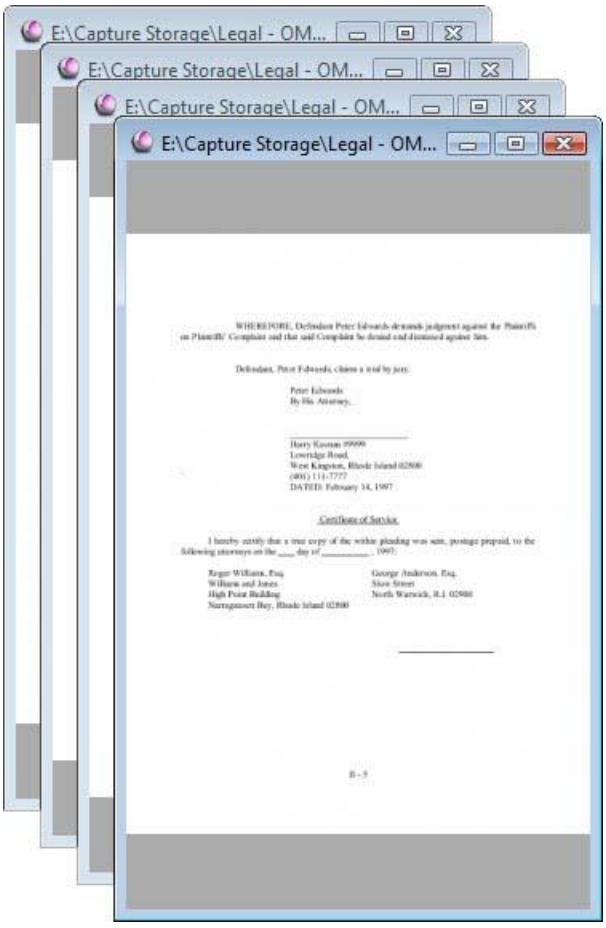


Window

Contains commands relevant to the Image Viewer Pane in PSI: Capture.

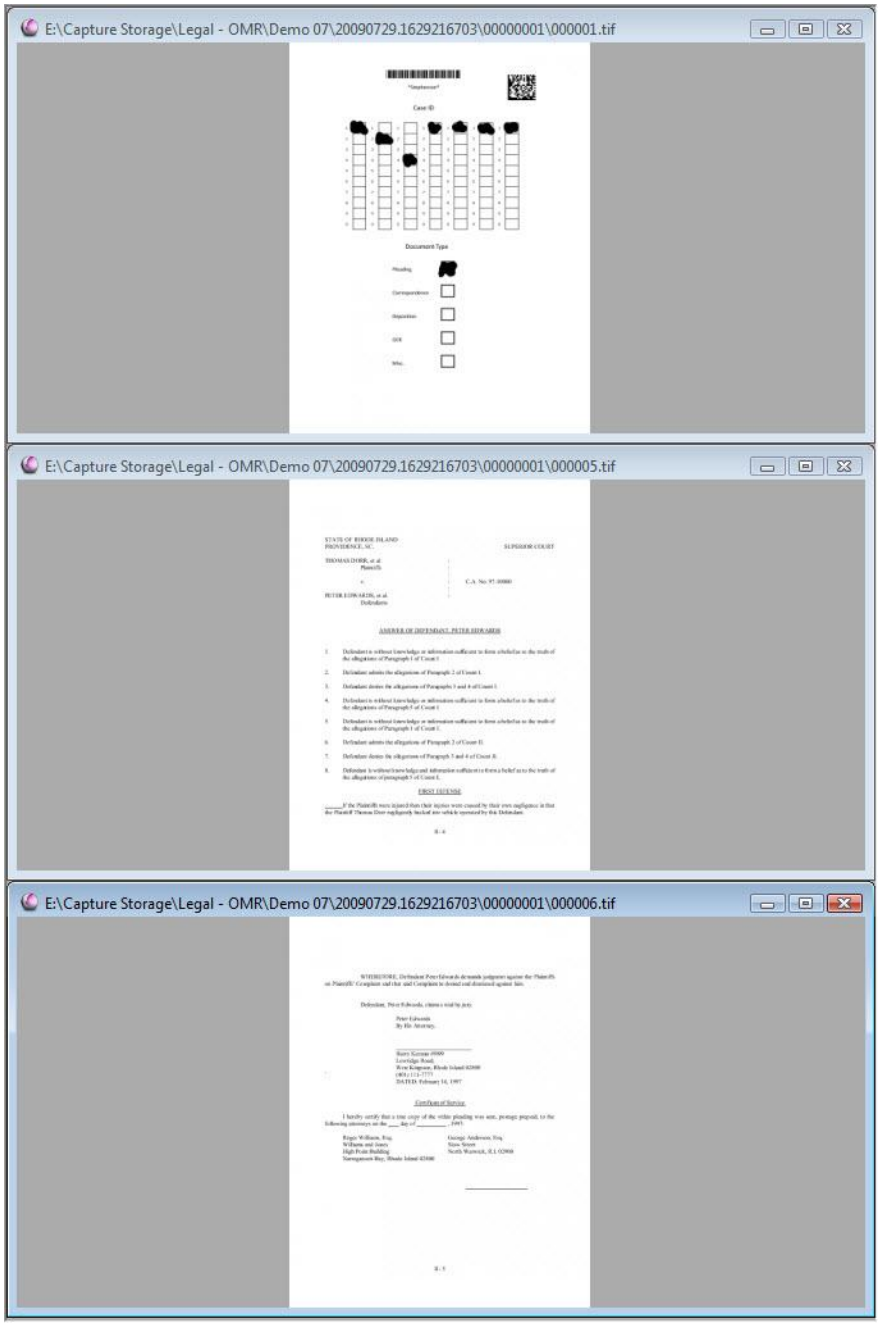
Cascade

Cascades all open windows in the Image Viewer Pane.



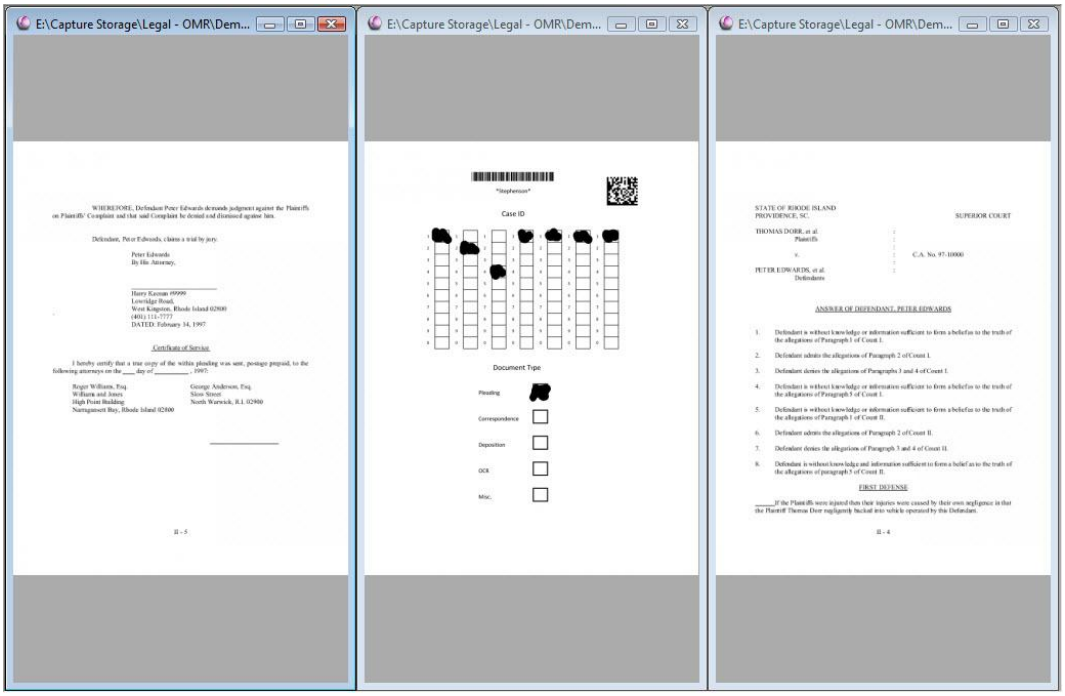
Tile Horizontally

Displays all open windows horizontally in the Image Viewer Pane.



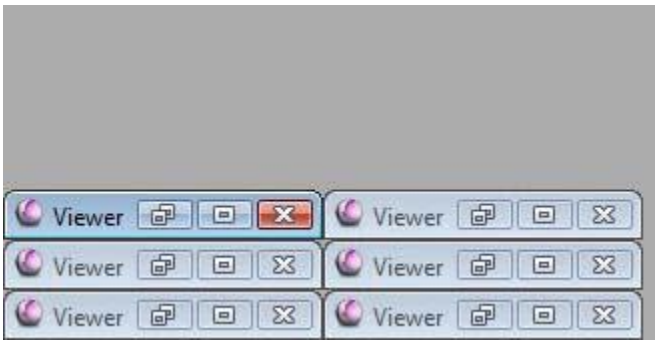
Tile Vertically

Displays all open windows vertically in the Image Viewer Pane.



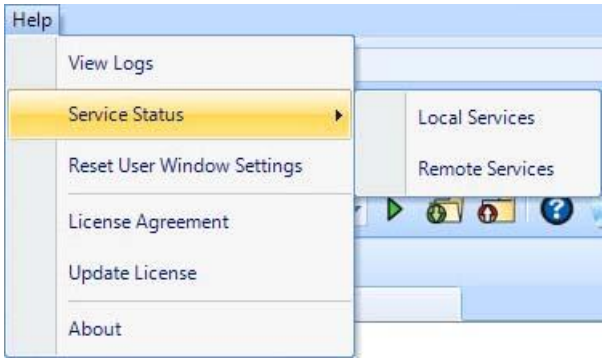
Minimize All Windows

Minimizes all open windows in the Image Viewer Pane.



Help

Contains information and details about PSI:Capture.



View Logs

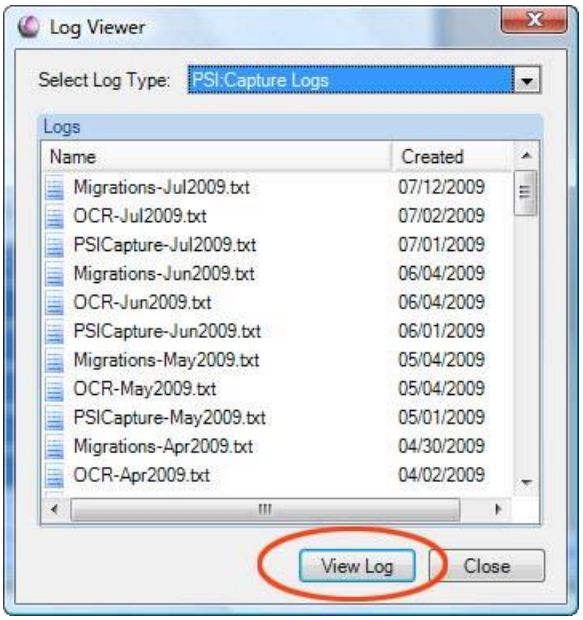
User can select either PSI: Capture Logs or Platform Service Logs.

Log Viewer (PSI:Capture Logs)

Displays a list of logs containing all PSI:Capture modules.

View Log

Pressing this button brings up the log in your default text file viewer.

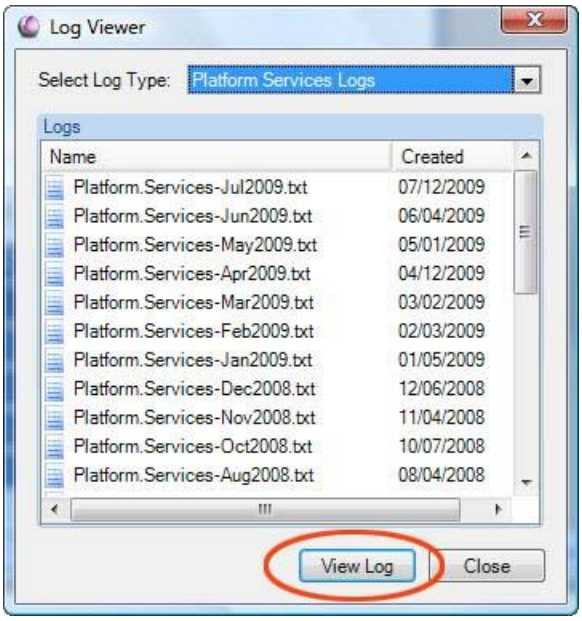


Log Viewer (Platform Services Logs)

Displays a list of logs for Platform Services.

View Log

Pressing this button brings up the log in your default text file viewer.



Service Status (Local Services / Remote Services)

Shows the version and current status of the services.

Reset User Window Settings

Resets the Window settings to default.

License Agreement

Displays PSI:Capture License Agreement

Update License

Updates PSI:Capture License with the License Server.

About

Shows PSI:Capture copyright information, maintenance expiration date, installed modules/assemblies, and license agreement.

APPENDIX A

Hot Keys Help

Batch

R	Reject Batch

Folder

E	Combine Folders
T	Rename Folder
DELETE	Delete Folder
R	Reject Folder

Document

F	Create New Folder
W	Combine Documents
DELETE	Delete Document
R	Reject Document

Page

Q	Split Document
X	Crop Page
DELETE	Delete Page

General

B	Toggle Bookmark
D	Flag Delete
A	Flag Review

S	Flag Reject
Z	Flag Process
C	Clear Flag
N	Notes
G	Tree Navigation – Go To Next Item

Viewer

+	Zoom In
-	Zoom Out
Page Up	Scroll Up
Page Down	Scroll Down
<	Rotate Left
>	Rotate Right
A	Actual Size
B	Best Fit
H	Fit to Height
W	Fit to Width
Home	Scroll to Top of Document
End	Scroll to Bottom of Document